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Yearbook 2011

The Quality of the Media

Digest: main findings

Switzerland

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Schwabe

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Yearbook 2011: The Quality of the Media – Switzerland

What is the purpose of the Yearbook?

The aim of the Yearbook is to strengthen awareness of quality of the media. The Yearbook will be a resource for people working in the media, those involved in politics, economics or academia and anyone with an interest in media trends and what the media are saying. The Yearbook is based on the understanding that the quality of democracy depends on the quality of the communication of information to the public by the media. The Yearbook is designed to help convey the idea that the quality of the media is an important aspect of public communication.

Who is responsible for the Yearbook?

The Yearbook is produced and published by the fög – the Center for Research on the Public Sphere and Society at the University of Zurich (www.foeg.uzh.ch). The following authors have contributed to the Yearbook 2011: Roger Blum (guest writer), Pascal Bürgis, Urs Christen, Mark Eisenegger, Patrik Ettinger, Angelo Gisler, Lucie Hauser, Florent Heyworth, Kurt Imhof, Esther Kamber, Jens Lucht, Sibylle Oetiker, Colin Porlezza (guest writer), Stephan Russ-Mohl (guest writer), Jörg Schneider, Mario Schranz, Linards Udriš, Bartosz Wilczek (guest writer), Marta Zanichelli (guest writer), Sarah Zielmann.

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Where is the Yearbook published?

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Main findings

What is the purpose of the Yearbook?

It was as early as the 5th century BC in the city-state of Athens that one of mankind's most powerful utopian ideals became established, namely that, in a free society, there must be free public communication, in order that the better argument can win the day. Indeed, the history of democracy shows that it fails without high-quality public debate. The public sphere is where problems which affect society as a whole and which need to be resolved are aired and discussed (the forum function). It serves a legitimisation and control function in relation to the state authorities and those who hold the power in society. Without public communication, that necessary loyalty between citizens which is essential in a self-regulating community based on the rule of law would not exist (the social integration function). This means that the quality of democracy is inextricably linked to the quality of public debate which results from the way in which the media convey information. However, since the decline of party newspapers on the one hand and the introduction of a dual system of public and commercial audio-visual media in the 1980s on the other, the media system has emerged as a separate sphere, and one which lacks any body that would carry out critical (self-)observation, document changes in the media system and the quality of public communication, and subject it to public debate.

It was to fill this gap that the Yearbook "The Quality of the Media – Switzerland" was created. The aim of the Yearbook is to increase the awareness of quality in relation to the media, on the part of both the general public and the media makers. The Yearbook will provide the public with a measure for deciding on the kind of journalism they wish to be exposed to, and the media makers with a measure for the kind of journalism they want to produce. As a fact-filled work of reference, it will be useful to anyone with an interest in media trends, media content or interaction between the media and politics and between the media and the economy.

The Yearbook 2011 will describe the current media structures and the quality of the information supply that is provided and of the reporting in the Swiss media arena. All forms of information media have been analysed, i.e., the press, radio, TV and online news sites. Within these forms, different media types are examined, i.e., for newspapers, the subscription, tabloid, free and Sunday papers are included, and also magazines; for radio and television, both public and commercial broadcasting is included, while the online news sites of the subscription, tabloid and free newspapers are covered, as well as the online portals of the audio-visual media and telecommunications companies. The analysis is on three levels:

1. At the level of the *media structures* in Switzerland, we are interested in the process of concentration, the media companies and their revenue, and the extent to which the public switches between media forms and media types, the diversity of media, and the stratification and segmentation of media consumers. At this level, all the information media in Switzerland are included which could potentially reach at least 0.5% of the population living in the various linguistic regions and over the age of 15.

This year, that amounts to 142 media outlets across all forms. In assessing the situation we collected and used as much publicly available and relevant data as possible, including that which has to be paid for, about the ownership and revenue of the media companies (fees, advertising, sponsorship, subscriptions, sales), along with the circulation, coverage and use of the media outlets.

2. At the level of *quality validation*, we are interested in the information supply, the issue agendas and the reporting, which we validate using the journalistic quality criteria of diversity, social relevance, topicality and professionalism, and the varying news agendas for different audience groups based on their media consumption. This intensive content analysis was carried out on the 46 main information media from all linguistic regions and of all forms and types, out of the 142 media outlets in the basic sample used to evaluate the media structures.
3. At the level of *in-depth studies*, it was primarily a question of carrying out investigations which shed light on changes at the interface of politics, the media and the economy, over as long a period as possible (mediatisation research).

Criticism of last year's Yearbook and innovations in this year's Yearbook

The follow-up to the first Yearbook, in the form of over 115 media articles, reviews and academic and social debates in Switzerland and elsewhere, together with critical remarks from colleagues, have not only validated the purpose of the Yearbook but have even improved it. During this follow-up, two main criticisms emerged: even though our finding that, with few exceptions, the quality of the information media has deteriorated was confirmed, it was also pointed out that not everything was better in the past. This indicates that change in the information media needs to be examined in long-term studies, going beyond the scope of the Yearbooks. Section VI.2 "Treating foreigners as a problem in direct democracy" is a response to this criticism and continues the series of diachronic in-depth studies. The second criticism related to the influence, noted by many observers, of Public Relations (PR) on editorial content and to the fact that this influence exerted by vested interests on public communication had not been examined. For that reason, an in-depth study on the influence of PR on economic journalism in Switzerland, which had originally been planned for later, has been prepared for this year's Yearbook.

An in-depth study has also been carried out on the monopoly of the Swiss news agency (*sda*). In order to be able to demonstrate the scale of *sda* reports in the information press, and due to the lack of transparency about sources, we had to develop some plagiarism-detecting software. This allowed us to expose the poor quality of "copy and paste" reports with no byline and reports with no byline that had simply been rewritten, and also the incorrect use of editorial initials on agency reports.

The Yearbook 2011 also aims to reflect the federal structure of Swiss democracy by carrying out studies at the regional level. To this end, it was a question of also considering those media and media companies which convey information not at a national level, but at the regional and local level. Section VI.1 "Northwest and Southeast Switzerland: the concentration process and media structures in the regional press market" looks, in the context of press concentration in Switzerland, at the journalistic supply provided by papers belonging to AZ Medien AG in Northwest Switzerland and Südostschweiz Mediengruppe AG in their local regions.

Finally, the "In-depth studies" (section VI) have been supplemented by a guest report by three journalism researchers who looked at the reporting errors in Swiss newspapers: Section VI.5 "The double weak point: frequency of errors and correction management" deals mainly with observed reporting errors, the willingness of editorial offices to take organisational or institutional steps to minimise errors and the effect of errors on the credibility of newspapers.

Thus, the Yearbook 2011 has been upgraded, thanks partly to its guest writers. They have turned it into a platform for revealing the "state of the art" of quality research, and the interplay between the public sphere and democracy in Switzerland.

Below, we summarise the main findings of the Yearbook 2011. These are subdivided into the following sections, to match the structure of the Yearbook itself:

- Section I, "Media arena", deals with the media structures in Switzerland, in their three main linguistic regions, German-, French- and Italian-speaking Switzerland, and the differences in quality between the media forms (print, radio, TV, online), the media types (e.g., public and private or commercial radio) and the various media outlets.
- Sections II–V, "Press", "Radio", "Television" and "Online", study the specific media forms in detail, and the various media types and outlets they include. In each case, the media structures in each form are considered for the main linguistic regions, and the quality of the content.
- Section VI, "In-depth studies", this time includes five separate detailed analyses: firstly, on the concentration of the press in Switzerland, and the range of press products in Northwest and Southeast Switzerland specifically; secondly, on the way foreigners have been treated as a problem in direct democracy since the 1960s; thirdly, on the effects of the monopoly of the Swiss news agency (*sda*), and the practice of reusing agency reports in the press; fourthly, on the influence of Public Relations in corporate reporting, and, fifthly, on the frequency of errors in reporting in the Swiss press.

1. Swiss media arena

Media structures

- *Decline in the use of information media:* When we consider the relevant information outlets in the three media forms of press, radio and television, we see that in the last decade the potential coverage of the population over the age of 15 in the three linguistic regions has, in some cases, declined sharply (see diagram 1). That is to say, in relation to the resident population, the circulation or use of information resources is falling; worst affected are the information programmes on television. The online news sites and online portals that are of interest here grew sharply from 2007 to 2009, starting from a very low level. However, the main channels for information journalism on the Internet, the online news sites of the subscription newspapers, experienced a slower rate of growth from 2009 to 2010, with growth remaining constant overall (as shown by the weekly usage data from NET-Metrix and by the daily usage data for 2007 to 2010 which we calculated from this. However, a comparison of our daily usage data – calculated based on weekly data – with the daily usage data calculated for the first time by NET-Metrix for 2010 reveals that our calculations were too high. These two sets of daily usage data are thus not comparable). Ever since 2005, the length of time for which online news sites are used has been falling. Furthermore, the coverage rate among the resident population by news sites and online portals has remained well behind that of the other three media forms. In a comparison of how often the different media forms are used, television is in the lead, ahead of the press, followed by the radio and finally online services. However, in these surveys, (physical) newspapers continue to be regarded as playing the most important role in providing information, and this is also true of the information content of newspapers that can be downloaded. This fact, and the number of printed publications, which is still high compared with other countries, means that Switzerland can still justifiably be described as a land of the press.
- *Information press under pressure:* Despite the continuing importance of the press in Switzerland, in the last decade the information press has been subject to the most change. As part of the privately

owned media form of the press, it is greatly exposed to fluctuations in the economy and, as a result of the two economic crises between 2001 and 2010, it lost a third of its advertising-based funding, representing a fall of about 0.8 billion francs. At the same time, falling circulation figures have led to reduced revenue from sales, as a result of which its appeal to advertisers has become even less. Above all, though, it is the introduction of free online and offline media which has led to the decline of paid-for newspapers. As for free offline media, while the number of free papers may have been reduced to three following the market shake-out in 2010, their coverage rate is an impressive 30% of the Swiss population, with the controlling companies *Tamedia AG* and *Ringier AG* now dominating the market for free daily papers.

- *Basic service provided by linguistic regional and local regional broadcasters:* In broadcasting, there is a stable basic supply of information programmes from public companies in all three linguistic regions. However, coverage among the population is in decline, especially for public television, something which is also connected with the shift towards use of the Internet, although precise figures are not yet available (mainly time-delayed use of information broadcasts). Private or commercial broadcasters, especially in radio, have managed to establish themselves with their information programmes so that they can potentially reach over 0.5% of the population in their linguistic region. This means that they are also contributing to the offering in their regional and local area. Nevertheless, the coverage rate of the information broadcasts from private companies is small compared with that of the *SRG SSR*. Across all three linguistic regions, the information programmes from commercial TV companies could only potentially reach less than one tenth of the population over the age of 15 which is covered by the information supply from public television. However, when it comes to radio, which has considerably more commercial providers than television, the information supply from private radio stations attains a third of the coverage of public ones.
- *Slower growth of online news sites of subscription newspapers:* The segment comprising the main websites for public communication on the Internet is small, and use of the main news sites operated by

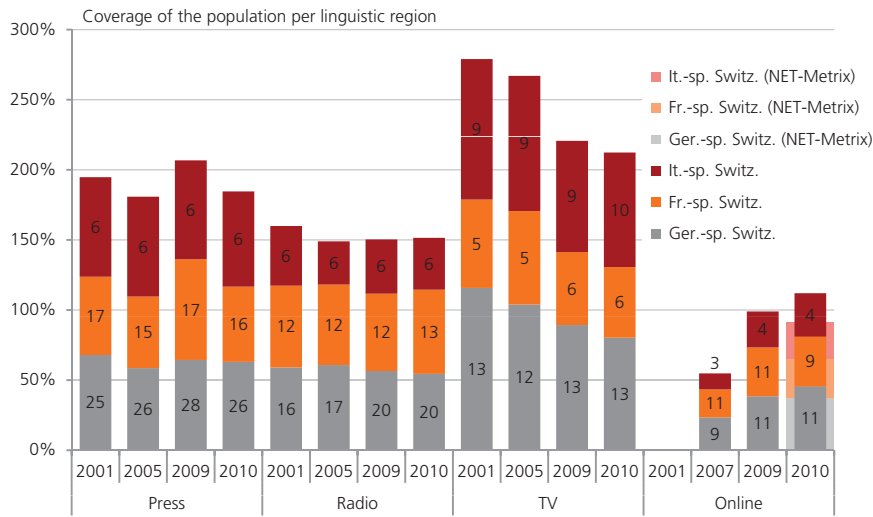


Diagram 1: Coverage rate – trends in the press, radio, television and online media forms in the linguistic regions from 2001 to 2010

The diagram shows, for each form and sample year, the coverage rate of the population in the various linguistic regions. The columns show the proportions of the cumulative figures for circulation and use among the population over the age of 15 in each of the linguistic regions. The statistics take into account all media outlets in the forms of press, radio, television and online which potentially reach at least 0.5% of the population in the three main linguistic regions. The numbers on the columns show the number of media outlets which were taken into account in accordance with the collection criteria.

Interpretation example: In 2010, the 26 press outlets in German-speaking Switzerland cover 63% of the population of German-speaking Switzerland over the age of 15 (cf. circulation and usage figures: WEMF, Mediapulse, NET-Metrix).

the traditional publishing houses lags behind that of online portals, which offer other services as well as information (replay, agency ticker, mail services, etc.). Regarding information supply compared with the online sector in general, the coverage rate compared with the other three media forms is still small, despite growth between 2007 and 2010, and the growth of news sites of subscription newspapers is slowing (as shown by the weekly usage data from NET-Metrix and by the daily usage data for 2007 to 2010 which we calculated from this. However, a comparison of our daily usage data – calculated based on weekly data – with the daily usage data calculated for the first time by NET-Metrix for 2010 reveals that our calculations were too high. These two sets of daily usage data are thus not comparable). If you also take into account that people's consumption of information on the Internet is very selective, and strongly controlled by search engines, then it becomes clear that there is no possibility here of building up any comparable kind of audience loyalty. Unfortunately, the funding situation for online services is hard to establish. In general it appears that, for the websites which were looked at from the point of view of funding (i.e., not only the

news sites, which were what was primarily being studied here), both the advertising revenue and the revenue from sales were extremely small compared with the other three media forms, even though a slight increase could be seen since 2007.

- *Concentration in the information markets:* A look at the concentration process in the overall market for information services across all four forms (press, radio, television and online) shows that, because of its statutory performance mandate, the SRG SSR is the dominant controlling company in radio and television. Certainly, on account of its position, the SRG SSR provides information programmes that guarantee basic supply in all three main linguistic regions. Of the other three main controlling companies, *Tamedia AG* has achieved a market position (18% market share) which, firstly, puts it well ahead of its competitors (*Ringier AG* 9% and *NZZ Group* 5%) and, secondly, gives it a powerful position – especially in western Switzerland, where it controls 74% of the French-speaking press market. When, in September 2011, *20 minuti* is launched in Italian-speaking Switzerland, so that this free paper is available throughout the country, the dominant market position of *Tamedia AG* will become even stronger.

Quality validation

- *Some deterioration in quality compared with last year:* Front page analysis shows some loss of quality in the Swiss media arena compared with last year. In terms of diversity, soft news reporting increased in 2010, while hard news reporting fell by 5 percentage points (PP). Regarding topicality, there has been a decline in the importance of thematic reporting, i.e., the kind which puts events into proper context (−9 PP), while the short-term, episodic presentation of events has become more common across all media forms. The quality balance-sheet is evened out when it comes to social relevance. Here, a slight increase was recorded compared with last year in the number of socially relevant macro stories in the Swiss media arena (+2 PP) and a fall in the number of stories focusing on the private lives of individuals (−4 PP). However, this standard-raising effect was offset by a marked increase in personalised reporting on people affected by catastrophes, accidents and criminality (+3 PP) and even more intensive personalisation of stories on the movers and shakers in politics and business (+4 PP). Only in terms of professionalism could some improvement in quality be detected. There was less moralising/emotional reporting and more of an objective, argumentative style (+12 PP). Nevertheless, this tendency towards higher quality, more objective reporting must be seen in the context of the high proportion of short, episodic reports which are generally based on factual news agency reports.
- *Increase in soft news in online media and free papers:* The biggest increase in the soft news that so far down quality can be seen in the online news sites (+7 PP) and free newspapers (+9 PP). Although an increase in soft news has also been seen on public radio and in the subscription newspapers (both +4 PP), these two media types score highest when it comes to the aspect of quality relating to socially relevant diversity. Quality drops dramatically in the transition from offline to online: the proportion of soft news stories is generally higher on the news sites than in the physical offline products. In the lower part of the middle range come the private TV and radio stations in terms of the ratio of hard and soft news. The greatest deficiencies when it comes to diversity, and the correspondingly highest propor-

tion of soft news stories, are to be found in the tabloid media, both off- and online, and the free media, both off- and online. The best quality ratings for socially relevant diversity were achieved by the media outlets *Neue Zürcher Zeitung*, *Echo der Zeit* (DRS1), *Rendez-vous* (DRS1) and *Le Temps* (88%, 87%, 86% and 82% hard news). Bringing up the rear in this respect were *Blick.ch*, *Aktuell* (Tele M1), *Le Matin* and *Blick* (23%, 30%, 32% and 35% hard news).

- *Public radio and subscription newspapers are the most socially relevant:* When it comes to relevance, public radio and the inter-regional subscription papers perform best (see diagram 2). This is where the largest proportion of macro stories is to be found (49% and 43%, respectively), i.e., reporting which also addresses more complex topics of relevance to society. A similarly high proportion of macro stories is found in the Sunday papers and the magazine (43%) and also – though certainly at a much lower level compared with public radio – on public television (38%). Online news sites in general and the tabloid and free media, both off- and online, have the lowest ratings for relevance, with a low proportion of macro-meso stories, but a high proportion of personalised reporting focusing on private lives. Private radio showed an increase in relevant macro reporting compared with last year. However, this is not really put into context and remains confined to local matters. Among the private radio and TV broadcasters, there is generally a high proportion of attention-grabbing, personalised reporting with the focus on the victims of crime, accidents or catastrophes. In terms of outlets, *Echo der Zeit* (DRS1), *Neue Zürcher Zeitung*, *Rendez-vous* (DRS1) and *Corriere del Ticino* have the highest proportion of macro stories and so the highest ratings for social relevance (60%, 56%, 55% and 53% macro). On the other hand, the highest proportion of micro-level stories, and so the poorest quality, is displayed by *Blick.ch* (79%), *SonntagsBlick* (70%), *Blick* (69%) and *Aktuell* (Tele M1, 64%).
- *Less context and big differences:* In terms of topicality, reporting which puts stories into context has declined most sharply compared with last year on public television (−13 PP), free online services (−10 PP) and private radio (−10 PP). The consequence of the further increase in short-term episodic

Media type	Focus on macro in all spheres of society	Media type	Focus on macro in the hard news sector
Public radio	49%	Public radio	54%
Subscription newspapers	43%	Subscription newspapers	51%
Sunday papers/magazine	43%	Sunday papers/magazine	47%
Public television	38%	Private radio	46%
Private radio	32%	Public television	44%
Subscription online	31%	Subscription online	41%
Free newspapers	26%	Free newspapers	38%
Private television	22%	Free online	33%
Free online	21%	Private television	33%
Tabloid newspapers	13%	Tabloid newspapers	24%
Tabloid online	10%	Tabloid online	22%

Diagram 2: Front page and lead stories – focus on macro-level stories, analysed by media type

The diagram shows the percentages of the macro social level addressed by front page and lead stories in each media type, for all spheres of society (left) and for politics, the economy and culture, i.e., hard news (right). It is based on all articles included in the analysis of front page and lead stories from 1 January to 31 December 2010 (n = 51,514).

Interpretation example: The comparison of media types shows that public radio focuses on the macro level most frequently, both in all spheres of society (49%) and in the hard news sector (54%).

reporting in free newspapers is that the amount of context provided is moving toward zero. In the free media, the world appears as one that is broken down into a series of individual events. There is barely any account of causes, and phenomena are no longer put into context or explained. The same is true of commercial radio broadcasters, while only the news sites of the tabloid papers provide even less contextual reporting than the already scanty amount offered by the online and offline free papers. A high proportion of contextual reporting can be found in the magazine *Weltwoche*, which has an ideological character (56% thematic reporting), the Sunday papers (24%), public radio broadcasters (26%) and inter-regional subscription papers (23%). On the other hand, the poorest quality reporting from the point of view of topicality (providing context on the day's news) is to be found in the online media in general and the free and tabloid media, both on- and offline. Along with the *Weltwoche*, the following media outlets scored highest for topicality: *Echo der Zeit* (DRS1, 43%), *Tribune de Genève* (41%) and *Il Caffè* (40%). *Leman.ch* (1%), *Radiogiornale* (Radio 3iii, 1%), *20minuten.ch* (2%) and *20 minutes* (2%) are all shown to be of very poor quality, with vanishingly small numbers of reports providing any context for stories.

- *Moralising attitudes and focus on emotional appeal, both online and in the tabloids:* In terms of professionalism (objective/argumentative versus moralising/emotive reporting), standards are worst in the online media in general (13% moralising/emotive reporting) and the offline and online tabloid media (37% and 29% moralising/emotive reporting, respectively). This is where the highest proportion of emotive/moralising reporting is to be found, in which opinions appear to be “readymade”, and objective argumentation is a low priority. Especially in the online media and free newspapers, there is a tendency to add a moralising/emotive charge to agency reports, with very little effort, and enhance them with attention-grabbing headlines. The Sunday newspapers and the magazine *Weltwoche*, which has an ideological character, also show an above-average proportion of moralising, emotive reporting (30%). Especially in the case of the magazine, this greatly restricts the diversity of opinions that are expressed. The free papers, both on- and offline, and commercial television are also of poor quality, with a high proportion of moralising/emotive reporting. The highest standards in terms of professionalism are to be found in the subscription newspapers (93% cognitive-normative reporting), public radio

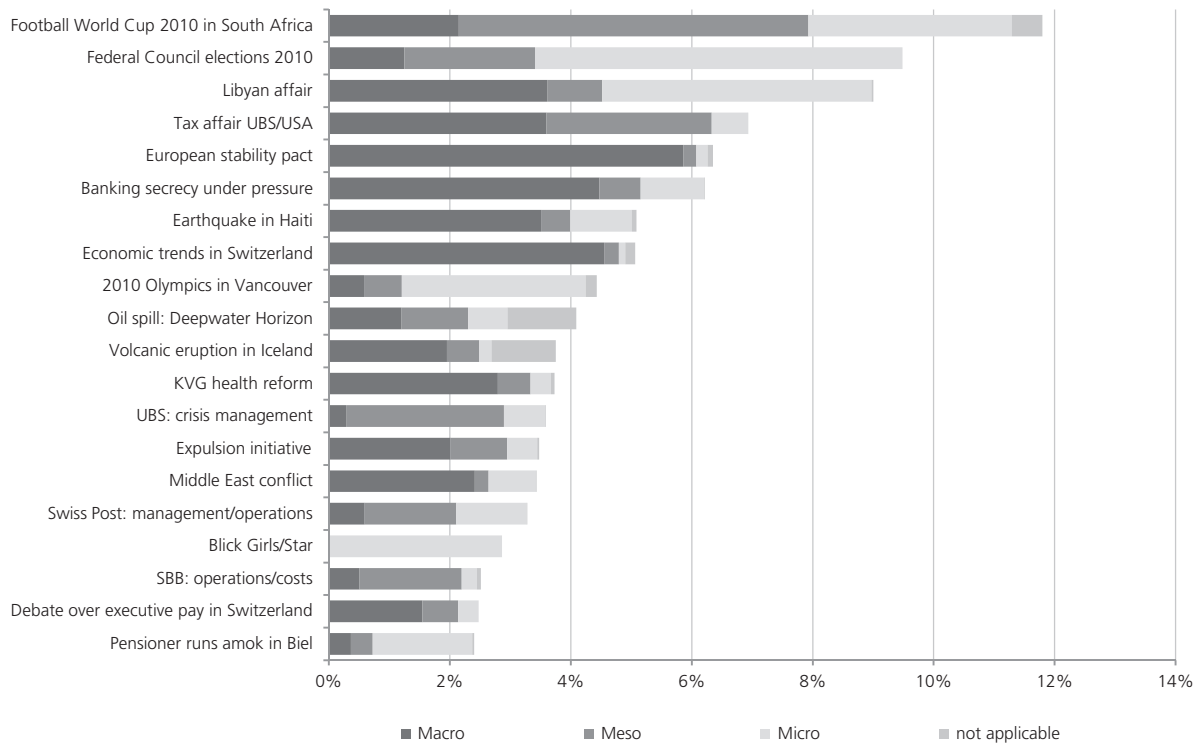


Diagram 3: Media agenda in Switzerland – targeted social levels of the top 20 communication events

The diagram shows the 20 main communication events (CE) in the Swiss media arena. They have been put in order based on their share in all the reporting on these top 20 CE. The bars show, for each CE, the social levels that are targeted, as a proportion of the total reporting on the top 20 CE. The diagram is based on all articles about the top 20 CE which were included in the analysis of front page and lead stories during the period of the study from 1 January to 31 December 2010 (n = 9775).

Interpretation example: The communication event covering the Federal Council elections in 2010 attracted the second most attention (ranked 2nd) in the Swiss media arena during the period of the study. 9.5% of the reporting about the top 20 CE was about the Federal Council elections. The coverage of this CE at macro level accounted for 1.3% of all reporting about the top 20 CE (and 8.9% within this CE).

(97%) and television (93%) and also on commercial radio (97%). However, whereas on public radio the high proportion of cognitive-normative reporting is a sign of journalism that involves a lot of research and putting stories into context, on commercial radio it is the result of using a large number of agency reports that are simply passed on unadorned. In terms of individual outlets, it is *Blick* (55%), *Blick.ch* (47%), *SonntagsBlick* (33%) and *SonntagsZeitung* (30%) which have the highest proportions of moralising/emotive reporting and so are of the poorest quality. The highest quality in this regard, on the other hand, is to be found in *Le 12h30* (RSR, 1% moralising/emotive), the *Neue Zürcher Zeitung* (1%) and *Le Temps* (1%).

- *Public radio and inter-regional subscription newspapers are the winners for quality:* The best performer for all the quality indicators in general was public radio, followed by the inter-regional subscription newspapers (*Neue Zürcher Zeitung*, *Le Temps*) and – some way behind – public television. This is where the highest proportion of hard news was to be found, a significant amount of relevant macro-meso reporting, above-average efforts to put stories into context and an objective-argumentative reporting style which permits diversity of opinion and encourages follow-up communication.
- *Poorest quality found in online news sites and in the tabloid and free papers:* The worst quality deficiencies for all indicators are to be found in online news

sites as a whole, and in both online and offline tabloid and free papers. The commercial radio and TV broadcasters feature in the lower part of the middle range in terms of quality. The main negative factors here are the high proportion of soft news, with the focus on crime, accidents and catastrophes, and reporting which barely provides any context but is geared towards the news ticker. In the mid-range, but well behind the inter-regional subscription newspapers, are the regional subscription papers. In some cases there is a high proportion of soft news, they tend to focus a great deal on less relevant meso and micro reporting and the reporting is very often only episodic. This is particularly true of the *Berner Zeitung*.

- *Issues on the agenda in 2010:* The agenda in the Swiss media arena in 2010 was dominated mainly by sports events (Football World Cup, Winter Olympics), political matters (Federal Council elections), affairs and scandals (Libyan affair, tax affair), catastrophes (earthquake in Haiti, oil spill, volcanic eruption) and economic issues (economic trends in Switzerland, crisis at UBS) (see diagram 3). As in the previous year, there was no sustained reporting on cultural matters. Overall, the importance attached to soft news stories is striking, even more so than in the previous year. For example, the Football World Cup in South Africa was number 1 on the agenda, followed by detailed reporting on catastrophes, other sporting events and scandals – events that were really soft news and accounted for over a third of the topics covered in the Swiss media arena. Apart from conflicts in the Middle East and the EU stability pact, international political or economic issues did not make it to the top of the agenda. This is confirmed by the decline in foreign reporting in the Swiss media arena (see Yearbook 2010, p. 57–60).
- *Differences in subject areas by linguistic region:* In the year under investigation, 2010, Switzerland was united across its three main linguistic regions primarily by sport, the Federal Council elections, problems of national identity and a generally shared awareness of the financial crisis. Compared with last year, soft news stories and, especially, sport, have gained in importance as the fixed points of a Swiss common denominator. With regard to economic policy, Italian-speaking Switzerland – the media

arena which is most inward-looking compared with the others – was the most aware. When it came to debate about national identity, German-speaking Switzerland was in the lead, while in French-speaking Switzerland an above-average proportion of the stories were on soft news (sport, human interest). This is where the huge influence of low-quality media outlets (free and tabloid newspapers, online news sites) can be seen.

- *Social integration function:* The subscription newspapers, and also public radio in particular, play an important role in encouraging social integration in Switzerland. Like last year, it is striking that it is mainly the public radio stations which provide the three main linguistic regions with information of both national and international importance. On the other hand, as might be expected, the commercial radio and television stations are more locally focused and deal with fewer topics which might contribute to a national common denominator. The free and tabloid papers, and online news sites, are also failing to perform a social integration role.

2. Press

Media structures

- *Commercialisation in the press market:* Commercialisation in the press market largely took place between the 1980s and the end of the century, with the dying out of some newspapers, combined with a process of concentration, leading to a reduction in the number of providers in the market, which at the same time was increasingly being taken over by Sunday papers, and, from 1999, free ones. Since then there has been an increase in the focus of the press on market and commercial strategies, in its dependence on economic trends and in the shifting of advertising revenue towards the free offline or online media. Falling circulation figures reduce the proceeds from subscriptions and sales, while at the same time cutting advertising revenue. As a result of cross-media trends, the press generally became less important between 2001 and 2010, and the main 48 printed publications in the three main linguistic regions reached an ever-smaller section of the population, as shown by the falling coverage rate (–10 PP).

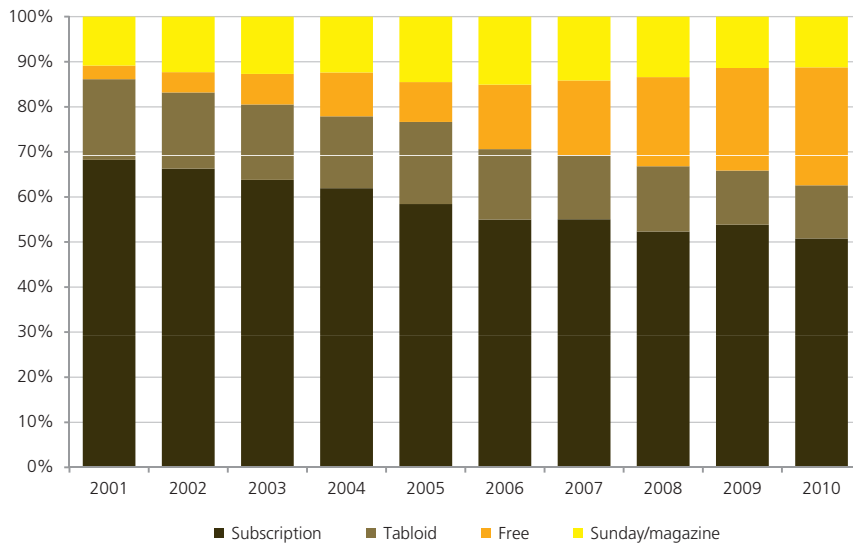


Diagram 4: Advertising statistics – trends in gross advertising revenue from 2001 to 2010

The data refers to 46 out of the 48 printed publications which each potentially reached at least 0.5% of the population over the age of 15 in their linguistic regions in 2010 (*La Quotidiana* and *Le Courrier* are missing). For these 46 publications, the trends in gross advertising revenue were traced back over 10 years. *Interpretation example:* A comparison of press types shows that, in the years from 2005 to 2010 alone, the free press increased its share of the annual advertising revenue from barely 9% to over 26%. Since 2001, the free press has gained ground steadily, while the subscription papers overall have lost revenue share (Source of the data: Media Focus).

- *Problem of free papers in the press market:* The problem of free papers in the press market is of its own making. In the cutthroat competition between, at times, six competitors in the German-speaking press market, and two in the French-speaking market, only three free publications controlled by *Tamedia AG* and *Ringier AG* have survived. These in their turn are having a detrimental effect in terms of distribution and advertising appeal on the survivability and journalistic quality of the subscription press (in terms of diversity of publications), in an already difficult press market. They are also reducing awareness among the general public of the true cost of journalism. While the free press is booming (see diagram 4), and its share of advertising revenue is increasing hugely (2001 to 2010: up 23 PP in a comparison of 46 printed publications out of the total sample of those 48 for which advertising revenue figures were available), in the subscription press widespread use is being made of systems where local editions share content with the national edition, editorial resources are being cut and the re-use of information and articles is increasing (loss of diversity in journalistic content).
- *Shortfalls in advertising revenue, and efficiency programmes:* There have been drastic changes in news-

paper funding due to falling advertising revenue and its consequences for editorial resources. After a slight recovery from 2009 to 2010, the net advertising sales have again barely exceeded the two billion mark, yet for the overall press market they are about a billion below the level for the year 2000 (3032 million francs). In the daily press – this concerns subscription and paid-for publications – net advertising sales reduced by as much as half between 2002 and 2010, from over two billion to barely one billion francs. The consequence of this has been efficiency programmes of various kinds: from newsrooms (*Ringier AG*) to systems where local editions share content with the national edition (*Tamedia AG* and *NZZ Group*). Especially for the subscription papers, these measures are leading to a reduction in journalistic jobs and resources.

Quality validation

- *Widespread free and tabloid papers which are of poor quality:* The most widely distributed publications in 2010 were those of the free papers, followed by the tabloids, which were also of the worst quality. In our analysis of information outlets, the low social relevance of the tabloid and free papers can be seen in their focus on human interest and sport and their

strong interest in the personal and private, combined with an episodic style of reporting which in the case of the tabloids is also charged with moralising/emotive overtones. Both press types also show very little transparency regarding their sources. The free papers perform particularly badly: their journalistic style is episodic, geared towards the news ticker and with no transparency about sources, while their editorial input is relatively small.

- *Soft news in the tabloid and free papers:* The very strong focus of the tabloid and free papers on sport (about 20%) and human interest stories (about 40%) can also be seen in the analysis of front pages (see diagram 5). Here political reporting is only assigned a slot amounting to about 20%. In these press types, the same very low level of journalistic context that is provided (episodic reporting) also applies to political and economic stories. This means that anyone who confines themselves to these two media types would barely benefit from any journalistic background information, even for key communication events such as the Federal Council elections, the expulsion initiative, the UBS crisis management or the debate about banking secrecy. As for sustained reporting on events outside Switzerland, this is confined to coverage of sports events and catastrophes.
- *Information provided by the subscription and Sunday press:* In contrast, the more clearly defined structures of the subscription papers and Sunday press go hand in hand with better handling of socially relevant material, as shown in the analysis of the range of information provided. Having clearly defined news sections and specialist journalists encourages a greater focus on social relevance. Among the subscription papers, the highest quality is achieved by those which could be described as inter-regional (*Neue Zürcher Zeitung*, *Le Temps*, to some extent the *Tages-Anzeiger*). These are distinguished by having serious foreign, domestic, economic and cultural news sections, by their background and opinion pages, a high input of material from their own reporters, much greater transparency about sources, more varied forms of presentation and a critical, reflective approach to culture. However, the less a clearly differentiated economic and cultural section still exists at a subscription paper, and the more the

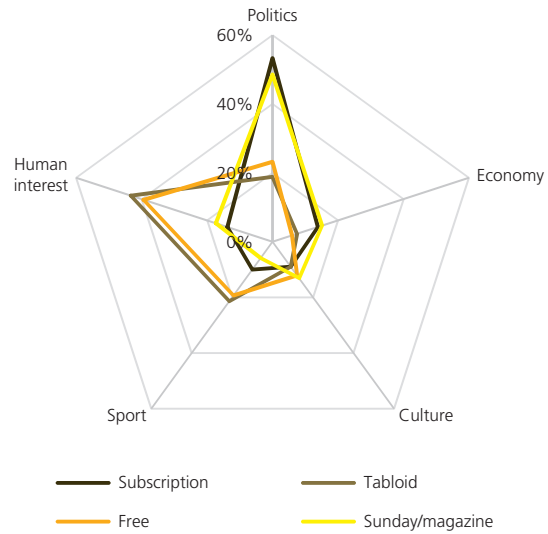


Diagram 5: Front page – focus on different social spheres

The diagram shows, for the front pages of each press type, the percentages of reports focusing on the different spheres of society. It is based on all articles included in the analysis of front pages from 1 January to 31 December 2010 (n = 21,161).

Interpretation example: A comparison of press types shows that the tabloid and free press report the least about politics (19% and 23%, respectively) on their front pages, and the most about human interest stories (43% and 39%).

political and news sections veer towards human interest, the greater the decline in quality (*Berner Zeitung*, *Tribune de Genève*).

- *Better quality subscription press:* Despite all the differences, in the analysis of front pages, the subscription press in general also performs best across all indicators. In particular, it is mainly through the subscription press and, to a lesser extent, the Sunday press, that socially relevant topics appear on the agenda. Among the subscription papers, the *Neue Zürcher Zeitung* and *Le Temps* provide continuous political and economic reporting for all regions, and so help to communicate information about both federal and international politics at all levels. These are the last papers still resisting the tendency to regionalise or nationalise their political and economic reporting. In varying degrees, all the other subscription papers are more concerned with regional and local matters.
- *The personal and emotional approach:* Reporting in the Sunday papers and the magazine is less socially relevant than that in the subscription press. The for-

mer depend more on personal stories, with a moralising/emotive charge, using forms of presentation that are dominated by personal opinion. This is connected with the potential of these press types to make news stories and create scandals. Analysis of the front pages shows that the Sunday papers and the magazine devote most attention to the personal angle on political and economic stories (focusing on the political and business elite), especially in relation to questions of national identity (policy on foreigners), while the Sunday press makes a name for itself by its early reporting of domestic political debates such as those connected with renewed conflict about reform of the armed forces or education policy.

- *Central role of the Sunday press and free press in launching controversial political stories:* When it comes to setting the agenda and the main stories in the press arena, the Sunday press, together with the free papers, plays a key role in launching the most controversial political stories and so can increase the impact of campaigns by politicians. Apart from the implications of using this system for deciding on newsworthiness in the way political stories are selected, a political agenda can also be detected: for example, stories about national identity are given a great deal of attention by the magazine *Weltwoche* and by the *Basler Zeitung*, with the *Weltwoche* also often giving them a moralising/emotive charge.
- *Considerable differences in the agendas of the different press types:* There are considerable differences in the areas of interest of the various press types: subscription, Sunday/magazine, free and tabloid (see diagram 6). This means that different user groups are confronted with quite different press agendas. These different agendas among the press types are also the reason why there are very few communication events which feature in both the top 20 for one particular press type and also the most frequently reported 20 of the press in general. For 2010, the only stories to which this applied were: the Football World Cup (No. 1), the Federal Council elections (No. 2), the Libyan affair (No. 3), economic reporting (No. 9) and the integration debate (No. 17). In the press arena, therefore, Switzerland in 2010 ultimately only found common ground in sport, government elections, economic analysis and questions of sovereignty and identity. In general it was the case that

those communication events which made it to the top of the press agenda showed a high degree of personal interest.

- *An unsure and polarised Switzerland:* The press agenda for 2010 reveals an unsure and polarised Switzerland. This manifested itself not only in the continuing focus on questions relating to national identity, but also, compared with last year, in the hugely increased importance of communication events connected with the economy. These stories related to the dispute with the USA about UBS's behaviour in acquiring the money of tax exiles, debates about banking secrecy, the UBS crisis management and debate over executive pay. The extraordinary coverage of the Federal Council elections in the media showed a preference, as regards newsworthiness, for the executive (at the expense of the legislative), and also an awareness of imminent crisis in connection with the concordance system. Finally, in addition to domestic debates, the Libyan affair brought Switzerland's backing on the world stage into question. The world is primarily represented in the press in terms of bilateral problems that Switzerland has with the EU or the USA, and reporting on sport or catastrophes. Since traditional reporting of foreign news is now only to be found in the subscription papers (and even there only to a lesser extent now), there is a growing tendency for Switzerland to be inward looking in what is communicated via the media.
- *Economic stories in Italian-speaking Switzerland, questions of national identity in German-speaking Switzerland:* With regard to the economic policy, public news reporting in Italian-speaking Switzerland pays the most attention to international economic developments: even though the press arena in Italian-speaking Switzerland is the most inward-looking, compared with that in German- and French-speaking Switzerland, the efforts by the EU to stabilise the situation resulting from heavily indebted countries and the weakness of the euro played a far larger role in the Italian-speaking Swiss press in 2010 than they did in German- or French-speaking Switzerland. When it comes to national identity, on the other hand, there is the most reporting in German-speaking Switzerland, followed by the press in French- and Italian-speaking areas. In a

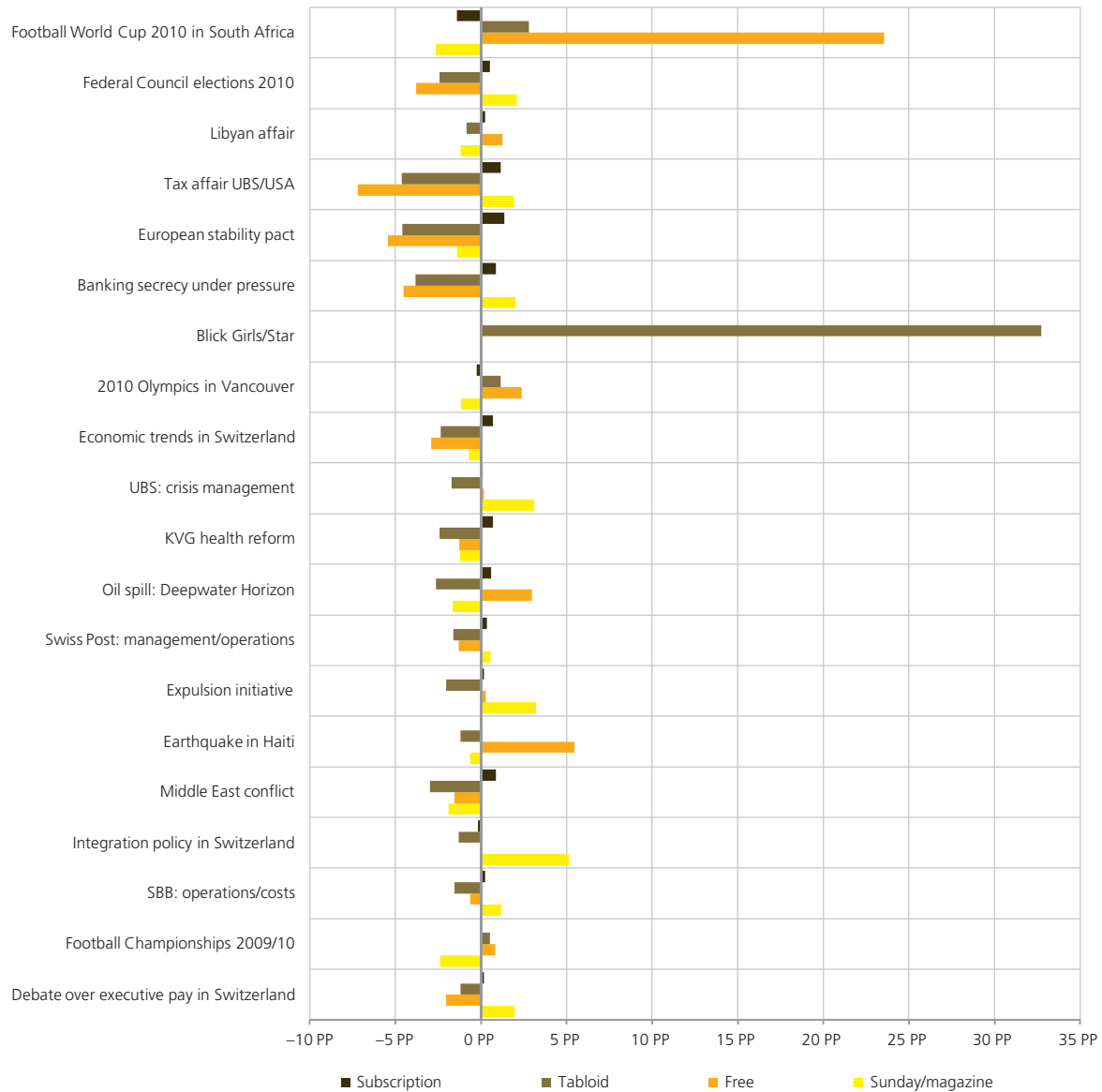


Diagram 6: Press agenda in Switzerland – areas of special interest for the different press types among the 20 top communication events

The diagram shows the 20 main communication events (CE) in the Swiss press arena. They have been put in order based on their share in all the reporting on these top 20 CE. The bars show, for each press type, the variation from the average share of that CE in all the reporting on the top 20 CE. The diagram is based on all articles about the top 20 CE which were included in the analysis of front pages from 1 January to 31 December 2010 (n = 4309). The *Blick Girls* were only covered in the tabloid.

Interpretation example: The communication event of the Football World Cup 2010 in South Africa received the most attention (ranked 1st) in the Swiss press arena during the period of the study. 10.3% of the reporting in all press types was on this CE. On the free press agenda, the coverage of this CE, which is 23.5 percentage points (PP) higher than in the agenda for the press as a whole.

comparison of the linguistic regions, the French-speaking press is striking because it concentrates even more on human interest stories and sport. In terms of their quality, the printed publications with the highest coverage rate in French-speaking Switzerland operate mainly in the middle or lower parts of the range. This makes a considerable difference to how relevant news stories are reported and presented.

- *Growing spread of a soft news culture:* In the press arena in French-speaking Switzerland, and also in German-speaking Switzerland, alongside the traditional hard news culture which is primarily represented by the subscription papers and Sunday press, there is also a soft news culture which is spreading as a result of the relentless advance of the free papers. The mainstream media channels in the press are, in German- and French-speaking Switzerland, soft news service providers. These mainstream media are controlled by the two largest members of the oligarchy which established itself during the concentration process that went on in the press market up until 2010: *Tamedia AG* and *Ringier AG*. These two drove forward the commercialisation of the press market and now dominate the tabloid and free newspaper business, while the third member of the oligarchy, the *NZZ Group*, operates in the subscription and Sunday papers market. Of the three members of the oligarchy, *Tamedia AG* enjoys the dominant position, controlling 43% of the market for Switzerland's leading printed publications. Along with this degree of market coverage and a multimedia strategy come extremely high expected profits of 15 to 20% (EBIT). *Ringier AG* and the *NZZ Group*, with 22% and 14% of the Swiss press market, respectively, are significantly behind *Tamedia AG* (43%). It should also be pointed out that, with the takeover of *Edipresse Publications SA*, *Tamedia AG* has expanded into French-speaking Switzerland, so that *Tamedia AG* has now become the dominant controlling company here, too (74% of the French-speaking press market). This oligarchy plays a key role in determining trends in the Swiss press market. Its members' models for cross-media financing of journalism and their investment in or, in some cases, cross-financing of, expensive high-quality journalism will be decisive in the future development of the press.

3. Radio

Media structures

- *Broad coverage:* Even though the radio is a medium for entertainment as well as information, the information programmes on the radio, and especially public radio, are important channels for public communication. The radio information programmes considered in the study, which could potentially reach more than 0.5% of the resident population over the age of 15 in the relevant linguistic region, together reach 151% of Switzerland's population. While this is less than the cumulative coverage rate for television's information broadcasts (215%), it is more than that of the subscription papers, Sunday papers and magazine put together (130%).
- *Intensive use of public services:* Compared with other people in Europe, the Swiss listen to the radio often and for a long time. When they want to find out about events at home and around the world by listening to news broadcasts, magazine programmes or forum-type programmes, they have a clear preference for broadcasts by the *SRG SSR*. If the cumulative coverage of Switzerland's population over the age of 15 is put at 100%, then 86% is provided by information programmes from public radio in German-, French- and Italian-speaking Switzerland, and only 14% by commercial radio stations in the linguistic regions.
- *Declining use and measuring problems:* Nevertheless, listening to the radio in the conventional way is on the decline, a particular problem for public radio, whose information programmes are being listened to less often. On the other hand, the information programmes on commercial radio channels have slightly more listeners. In any case, it is not yet possible to measure the prevalence of time-delayed use of information services, for example via the Internet (podcasts). This method of use is most common with information programmes on public radio. This is why the noted shift in use from public to private radio services should be interpreted with caution.
- *Declining popularity of programmes providing background information:* Especially the news broadcasts by public radio are being listened to "live" by fewer and fewer people in all three linguistic regions. The format of the magazine programme in particular,

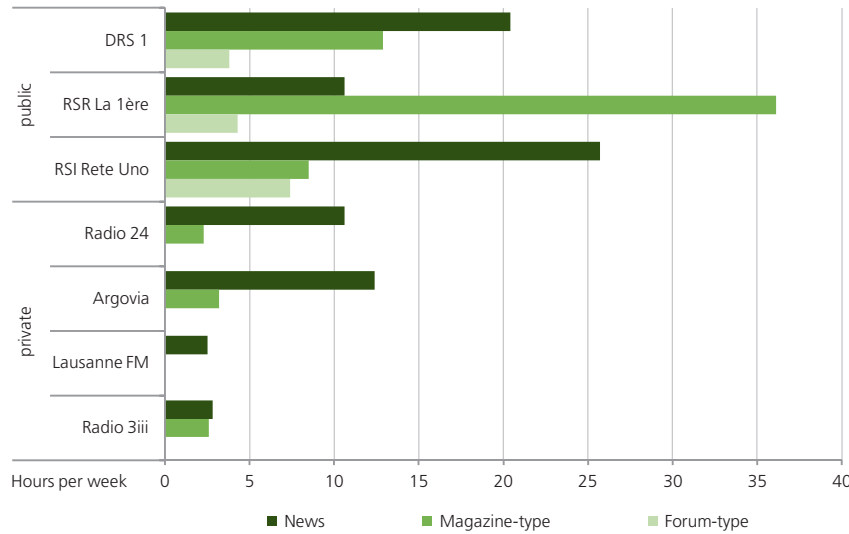


Diagram 7: Information supply and information programmes – time dedicated

The diagram shows the amount of time dedicated to the various formats for information programmes – news, magazine and forum-type – on the radio stations, grouped by radio type (public/private). It is based on all editions of the information programmes that were broadcast during the sample week from 13 to 19 September 2010 (total no. of hours = 166).

Interpretation example: The public radio station *Rete Uno* broadcasts information about 26 hours a week in news format, about 9 hours in magazine-type format and about 7 hours in forum-type format.

which allows really in-depth discussion of socially relevant topics and events, is reaching smaller and smaller sections of the population in German-speaking Switzerland and, to some extent, Italian-speaking Switzerland. While it is quite likely that these magazine programmes are being listened to more over the Internet, nevertheless loss of reach of about 20% over the last ten years, and about 5% just in the last year, for example for *Echo der Zeit* (DRS1) or *Rendez-vous* (DRS1), is very striking. Only in French-speaking Switzerland does the magazine format on public radio still enjoy considerable popularity.

- *Deficit economy, loss of quality:* Economic conditions for private radio have deteriorated since 2006 when it comes to advertising revenue. Since the new Swiss Radio and Television Act (RTVG 2007), many private radio stations receive, in return for their concession, a part of the licence fee, at the expense of public broadcasters. Naturally, there are higher expectations for the services of those companies which have a performance mandate. However, analysis of the information services provided by various different companies and types (private/public), and of the lead stories in the main news programmes, shows considerable quality deficiencies in commercial radio, entirely regardless of whether they receive part of the fee or not.

Quality validation

- *Widely differing information supply:* The predominance of music in schedules, and limited journalistic resources, mean that information programmes do not play an important role in the overall output of commercial radio. With commercial broadcasters, the amount of clearly defined information programmes ranges on average from about 5 hours (*Radio 3iii* and *Lausanne FM*) to about 15 hours (*Radio Argovia*, *Radio 24*) per week, while the main public radio channels broadcast 37 (*DRS1*) or 42 (*Rete Uno*) or even 51 hours a week (*La 1ère*). The poor quality of commercial radio is also reflected in the fact that barely any in-depth information programmes such as magazine or forum-type programmes are included in the schedule. Whereas public radio broadcasts a total of 69 hours a week of socially relevant magazine and forum-type programmes, on commercial radio the total number is just 8. Finally, even the news programmes on commercial radio are much shorter than on public radio, which makes it difficult to provide any context for complex issues and events (see diagram 7).
- *Soft news orientation on commercial radio:* The news broadcasts on commercial radio are very strongly oriented towards soft news. Human interest stories and sport take up nearly as much time, at 43%, as all

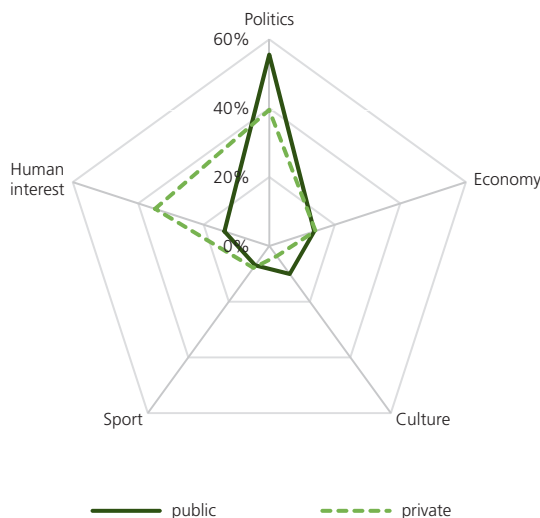


Diagram 8: Lead stories – focus on different social spheres

The diagram shows the percentages of lead stories for each radio type (public/private) focusing on the different spheres of society. It is based on all stories included in the analysis of lead stories from 1 January to 31 December 2010 (n = 9907).

Interpretation example: Of all the stories on private radio stations, nearly 40% were about politics, 14% about the economy, 4% about culture, 8% about sport and 35% about human interest.

the political, economic and cultural reporting combined (see diagram 8), with barely any background information based on journalistic research. If any socially relevant (national) issues are discussed, then on commercial radio they are only very rarely explained or put into context. Even within the news programmes, regional reporting, for which private radio stations have a concession, consists of 56% soft news. This means that public radio, which produces its own regional programmes, is of a higher quality than private radio even in regional reporting. If a private broadcaster like *Radio 3iii* devotes 65% of its regional reporting to soft news, and therefore barely makes any contribution to providing a forum for the region or to its legitimisation or control function, this contravenes both the letter and the spirit of the concession.

- *Differences between public services:* However, the contribution of public radio to the quality of public communication is not the same for all three main channels from the SRG SSR. In a comparison of public broadcasters, the information service from

Rete Uno comes well behind its equivalents in French-speaking and, especially, German-speaking Switzerland. Information is delivered more in the form of mixed news programmes, whereas *DRS1* is notable for its in-depth news magazine programmes and *La 1ère* for its in-depth cultural magazine programmes, which set them even further apart from commercial radio. The small linguistic region of Italian-speaking Switzerland is relatively well provided for with information programmes, but it is still disadvantaged compared with the other parts of the country, served by one poor quality commercial broadcaster and a similarly slightly inferior main public radio channel (see diagram 7).

- *Social relevance, personalisation and a drop in contextual reporting:* When the media forms are compared, the radio arena offers a varied, relevant and objective information service, mainly thanks to the public providers. However, compared with last year the amount of personalised news has increased in 2010, and the previously high standard of contextual reporting on public radio is falling, or, in the case of commercial radio, slipping further from an already low level.
- *Social integration function:* Compared with television, the overall radio agenda (the 20 main communication events in the radio arena) reflects more effort to ensure that relevant topics from Switzerland and elsewhere are reported and that the public in the various linguistic regions are informed about them. An important role in this is played by public radio. In particular, *Echo der Zeit* (*DRS1*) can be described as a beacon of light in public communication, on account of its reporting of socially relevant events in Switzerland and abroad. Commercial radio, on the other hand, plays only a modest role in this. Nevertheless, its agenda is more strongly oriented than that of commercial television towards socially relevant top stories, even though they are conveyed in the form of episodic reporting based on agency stories. The social integration function of the radio is also limited by its orientation towards (often regional) soft news stories.
- *Economic and foreign reporting:* As in the other media forms, so also in radio reporting Switzerland was united by the Federal Council elections, which were presented in a very personalised way, and by threats

from outside, as in the case of the Libyan affair and the debate on banking secrecy. The healthcare reform, with the emphasis on processes, also preoccupied the media in all three parts of the country. When the media forms are compared, however, the radio arena can be seen to be far more aware of the problems following the economic crisis, and attaches a particularly high priority to economic reporting. Furthermore, public radio in particular conveys an outlook which transcends linguistic and national boundaries, for example when the European stability pact was given great prominence in both German-speaking and Italian-speaking Switzerland.

- *National identity stories and soft news:* The radio arena in German-speaking Switzerland is the most involved – mainly because of public radio stations – in socially relevant topics and pays less attention to major sporting events. At the same time, like all forms of information media in German-speaking Switzerland, it pays very close attention to politics of national identity, in the form of the expulsion initiative. This topic is clearly most strongly rooted in public communication services in German-speaking Switzerland. In French-speaking Switzerland, while the radio arena may be more socially relevant by comparison with the television arena, it is more inward looking than that in German-speaking Switzerland. The radio arena in Italian-speaking Switzerland is more aware of the problems following the economic crisis, but the dominating focus on soft news on commercial radio in Italian-speaking Switzerland, and to some extent also on public radio, drives important and socially relevant topics off the main agenda.

4. Television

Media structures

- *Broad coverage:* Even though the Swiss do not watch television as intensively as other Europeans, in Switzerland TV is still the most frequently used medium, slightly ahead of radio, with usage increasing from German-speaking to French-speaking Switzerland and being the highest in Italian-speaking Switzerland. Leaving aside the use of television for entertainment purposes, and taking account only of the most widely broadcast information programmes which potentially reach more than 0.5% of the population over the age of 15 in the linguistic regions, then information programmes on television reach a total of 215% of the population. That is significantly more than the information broadcasts on radio (about 151% coverage).
- *Widespread use of the information programmes of the SRG SSR:* When it comes to news programmes, and those in magazine or forum format, services from public television are clearly preferred. 93% of the coverage described above is accounted for by the information programmes from the SRG SSR and only 7% by those from private TV stations. For example, the main news programmes from the most widely broadcast private stations *Tele Züri*, *TeleBärn*, *Tele M1* and *Tele Tell*, which together cover a highly populated section of German-speaking Switzerland, are only watched by about 150,000 people (not counting multiple watching of repeats); this viewing figure is five times lower than that for *Tagesschau* on *SFI* alone.
- *Loss of reach, and measuring problems:* The popularity of information programmes, like that of television in general, has fallen greatly in the last 10 years. The coverage rate for all three types of information programme (news, magazine and forum) is in decline. However, it is not (yet) possible to measure the usage via new channels, or time-delayed usage, for example via podcasts. The figures should therefore be interpreted with caution, especially for public television. Nevertheless, at least for conventional watching of forum programmes and, especially, news programmes on public television, it is the case that it is in rapid decline and that in the period from 2001 to 2010 these programmes lost up to a quarter of their audience.
- *Magazine programmes as a way for TV to stand out:* In-depth formats such as magazine programmes, which are almost exclusively available on public television, have been, in contrast to those on public radio, somewhat less affected by the falling audiences. And because Swiss television has the potential to expand and develop this type of format, this could give television an opportunity to stand out more clearly with specialist, well-researched background programmes.

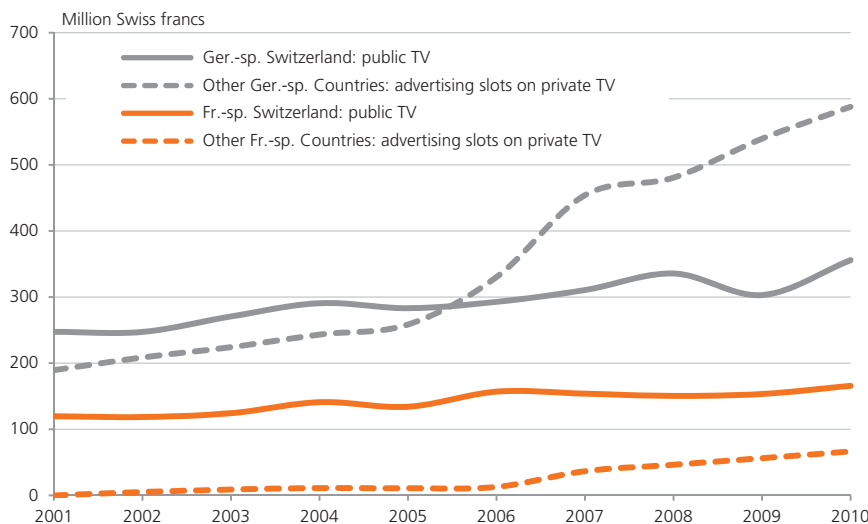


Diagram 9: Gross advertising revenue for public television and from advertising slots on foreign private stations in German- and French-speaking Switzerland

The diagram shows the gross advertising revenue for public television in German-speaking Switzerland (*SF1*, *SF zwei*, *SF info*) and French-speaking Switzerland (*TSR1*, *TSR2*), compared with the advertising revenue of foreign private broadcasters gained from Swiss advertising slots (German-speaking: *Kabeleins*, *ProSieben*, *RTL*, *RTL II*, *Sat.1*, *Vox*, *MTV*, *Super RTL*, *Viva Schweiz*; French-speaking: *M6*, *Cartoon Network*).

Interpretation example: In 2010, the advertising revenue for private broadcasters in other German-speaking countries from Swiss advertising slots, at about 588 million francs, was considerably higher than the advertising revenue of the public television channels *SF1*, *SF zwei* and *SF info* (about 356 million francs) (Source: Media Focus).

- *Low additional revenue for public television:* Trends in advertising revenue show that, over the last 10 years, public television has been receiving a far larger slice of the advertising cake than Swiss private television. The advertising revenue for public television in German-speaking Switzerland, for which the most statistics are available, amounted to around 351 million francs in 2010 (excluding the special-interest channel *SF info*), and, for all the regional private stations together, only about 51 million, i.e., about seven times less. However, both public and private regional television channels in German-speaking Switzerland are benefiting only to a very limited extent from the growth in advertising revenue in the television market. This is because advertisers are investing more and more in the advertising slots of foreign private broadcasters, in 2010 about 588 million francs, i.e., about 237 million francs more than in public television (excluding the special-interest channel *SF info*). In this way, the foreign private broadcasters generate very high advertising sales with no journalistic benefit (diagram 9).
- *Low viewing figures, scant resources and poor quality in private television:* The information programmes

of private television stations, unlike those on public television, continue to reach only a small part of the population. Among the private channels, the information programmes on, for example, *Tele Züri* or *TeleBärn* are losing viewers, while others, such as *Tele Ticino* or *Tele MI*, have been able to increase their coverage. It also appears that the advertising money in the television market is not really going to regional private television, but rather to the German-speaking Swiss entertainment channel 3+ and, above all, the private channels of foreign providers. Under the new Swiss Radio and Television Act (RTVG 2007), many of the regional private broadcasters receive fees so that they can offer better-quality information programmes. Correspondingly high standards should be set for those broadcasters with a performance mandate, such as *Tele Ticino* or *Tele MI*. However, analysis of the information supply provided by the different companies and types (private/public), and of the lead stories in the main news programmes, reveals very low quality standards on private television. Irritatingly, private broadcasters both with and without a share of the licence fee suffer equally from this.

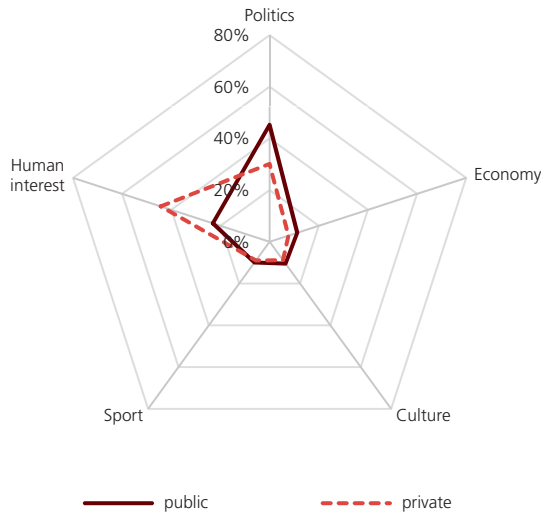


Diagram 10: Lead stories – focus on different social spheres

The diagram shows the percentages of lead stories for each television type (public/private) focusing on the different spheres of society. It is based on all stories included in the analysis of lead stories from 1 January to 31 December 2010 (n = 10,236).

Interpretation example: Private television focuses least in its lead stories on the economy (8%) and most on human interest stories (44%).

Quality validation

- *Varying amounts of information programming:* On private television, information programmes play only a secondary role. While public television on its first channels screens between 20 hours (LA1 and TSR1) and 40 hours (SF1) per week of information programmes, the four private companies that were looked at put out a total of only 5 to 7 hours on average (not counting repeats), i.e., only about 1 hour a day. And while public television, especially SF1, also offers more in-depth magazine programmes, on private television socially relevant and specialised magazine-type programmes are extremely rare. Only forum-type programmes, which are less expensive to produce, such as discussion programmes, can be found on a few private channels.
- *Focus on soft news even on private television channels with a performance mandate, funded by licence fees:* The worst quality deficiencies are to be found on the

German-speaking Swiss private TV stations in the study, *Tele Züri* and *Tele M1* and, to a lesser extent, on the private channel *Tele Ticino* in Italian-speaking Switzerland. *Tele Züri*, which, being only a registered broadcaster, is not subject to the same requirements as the private TV channels with concessions, and *Tele M1*, which is partly financed by licence fees, each produce just one main news broadcast, of which only one third is devoted to hard news (see diagram 10). *Tele Ticino*, which is also partly funded by licence fees, does broadcast specialist magazine and forum-type programmes, but almost half its main news programme is given over to soft news. Even the regional reporting, the socially relevant reporting of which is supposed to be the core competence of regional private TV stations, comprises only about one quarter hard news on the stations referred to above. These TV stations also employ an extremely personalised style of reporting, providing very little context and taking a moralising/emotive stance, even for topics of national interest. In this respect, German-speaking Swiss private television channels and, to a slightly lesser extent, *Tele Ticino*, are similar to the tabloid and free newspapers. However, the private broadcaster *Léman Bleu*, which is partly publicly owned, shows that private television does not necessarily have to be of such poor quality: the main news programme on *Léman Bleu* is normally dominated by relevant hard news (about 70%), which is less frequently presented in a moralising/emotive way and does not focus so much on personalities in its political reporting.

- *Different roles played by the main public channels:* SF1 is characterised by offering the most extensive information service. It broadcasts two different main news programmes, as well as magazine-type programmes, especially on cultural matters, and specialist programmes on the economy; among all the television news programmes, measured against all the indicators, *Tagesschau* continues to come off best, even if the proportion of hard news may be falling slightly. TSR1 and LA1, on the other hand, schedule only half as many information programmes, and while TSR1 does broadcast some (few) in-depth and relevant magazine programmes, in its news programmes it has a slightly higher proportion of soft news and personalised stories. Among the public

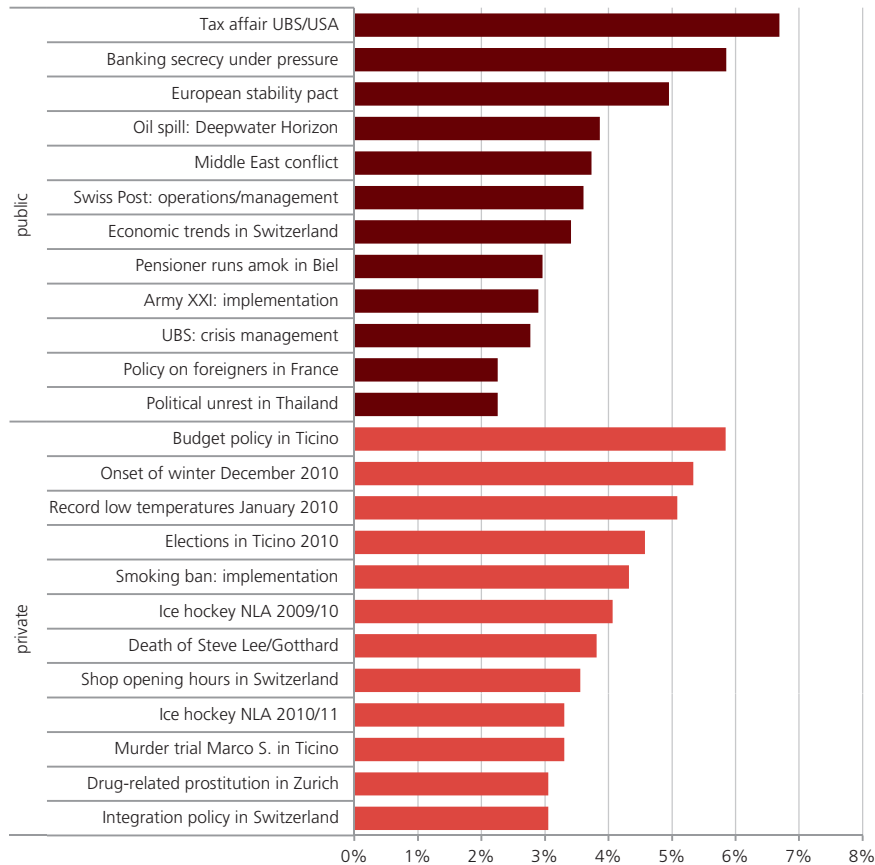


Diagram 11: Agendas of private/public television – areas of special interest

The diagram shows, for each type of television, the 20 main communication events (CE), measured as a proportion of all the reporting on these top 20 CE within that type of television. Those CE are shown which only appear in the top 20 CE for one of the two types of television (public or private). The diagram is based on all stories included in the analysis of lead stories on the top 20 CE during the period of the study from 1 January to 31 December 2010 (n = 1950, of which 1556 were on public television and 394 on private TV stations).

Interpretation example: The communication event relating to the onset of winter in December 2010 accounted for 5.3% of the reporting on the top 20 CE of the private TV agenda, during the period of the study. This CE, like eleven others, was only in the top 20 CE for private TV and not for the public providers.

television channels, *LA1* is of the poorest quality, in respect of the number of information programmes, the diversity of format (no forums), and general diversity and social relevance.

- *Weaknesses compared with public radio:* A trend towards mixing information and entertainment can be seen on the main channels of all the public television stations. On public television, the range of information programmes is less extensive than on the radio, and on the main news programmes of public television, the diversity and relevance are limited compared with public radio. Furthermore, the proportion of relevant international reporting is nowhere near as high as on the flagship programmes on public radio, such as *Echo der Zeit (DRS1)*. The host of small-scale, peripheral communication events on public television, dealing with soft news

stories from all over the world, and a style of reporting which is more personalised than on the radio, and provides less background information (episodic reporting), are a clear indication that public television could distinguish itself much more by dealing with more exclusive, socially relevant topics and reporting more background information. It remains to be seen what effect the merging of the editorial offices of public television and radio will have in this respect, i.e., whether the quality of public radio declines or television can make a better contribution to the quality of public communication.

- *Varying social integration services:* Public television in particular plays an important role in bringing socially relevant problems to the public's attention across the linguistic regions. However, television's agenda (the 20 main communication events in the

television arena) is much more strongly dominated by soft news stories than the radio agenda. This is largely due to private television, which focuses primarily on regional human interest stories (see diagram 11), but in addition, the reduced diversity and relevance on public television compared with public radio means that there is less integration across the three main linguistic regions. In the end, the result of this was that the Football World Cup in South Africa was the only topic which appeared on the agenda of the 20 main communication events for all the public and private television channels. The tabloidisation tendency is also bringing about a decline in the country-wide reporting on socially relevant topics, which goes beyond the highly personal top stories with their moralising/emotive charge.

- *Fixated on the problems of Switzerland and little importance attached to reporting of foreign news:* Overall, the television agenda, like the press agenda and even more than the radio agenda, is fixated on Switzerland, its bilateral problems and threats to Switzerland from outside, as shown in the Libyan affair and the banking secrecy debate; the linguistic regions were also united by the personalised reporting about the Federal Council elections. Only public television channels also explore problems abroad, (e.g., the European stability pact), and so make an important contribution to diversity and relevance, albeit a lesser one than public radio.
- *Specific features of the linguistic regions:* The German-speaking television arena in Switzerland, especially public television, is most receptive to stories and problems of national interest. However, it can also be seen that debates about exclusion, in relation to politics of national identity, are given a great deal of attention on both types of German-speaking television in Switzerland. On the other hand, the television arenas in French- and Italian-speaking Switzerland are more inward-looking, although television in Italian-speaking Switzerland, like the press and radio, is more aware of problems connected with the economic crisis. At the same time, a very strong focus on sports events, especially in Italian-speaking Switzerland, on both types of television, tends to drive important topics of national interest off the agenda.

5. Online

Media structures

- *Online coverage:* While the coverage rate of online media increased rapidly between 2007 and 2009, the news sites of the subscription newspapers experienced slower growth from 2009 to 2010, with growth remaining constant overall (as shown by the weekly usage data from NET-Metrix and by the daily usage data for 2007 to 2010 which we calculated from this. However, a comparison of our daily usage data – calculated based on weekly data – with the daily usage data calculated for the first time by NET-Metrix for 2010 reveals that our calculations were too high. These two sets of daily usage data are thus not comparable). Furthermore, compared with the other three media forms, the coverage rate continues to be small. There is also a gap between the news sites of the traditional print media, and the online portals, which, unlike the news sites of the traditional publishing houses, offer mail services and time-delayed use in addition to information services. These online portals are more successful than the actual news sites: in 2010, they potentially reached 74% of the resident population compared with a coverage rate of 38% for the actual news sites.
- *Frequency and duration of use are declining:* The amount of time spent using online news sites is decreasing. There is perhaps a connection here between click rate journalism and the transitory periods of access by a public which also shows little loyalty to this medium in terms of the frequency of their usage. Online is a volatile medium which has to fight against ever-shorter visits and a low level of customer loyalty.
- *Financing problems:* Compared with the other three media forms, the advertising revenue that is available to online media, like the proceeds from sales, remains very small. In view of the culture of free media that has become established, it is questionable whether the new paid-for content systems and other strategies for funding online services will succeed in reversing the trend. These structural factors have an impact on the quality of online reporting.

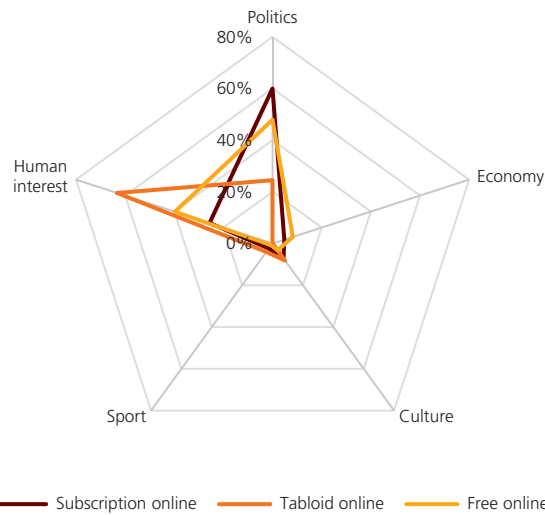


Diagram 12: Political section – focus on different spheres of society
The diagram shows the percentages of stories focusing on the different spheres of society addressed by the political section of each online type. It is based on all stories in the political section on the sample dates of 16 and 17 September 2010 (n = 377).

Interpretation example: A comparison of the online types shows that the political section of online tabloid papers concentrates most on human interest stories (63%) and least on politics (25%).

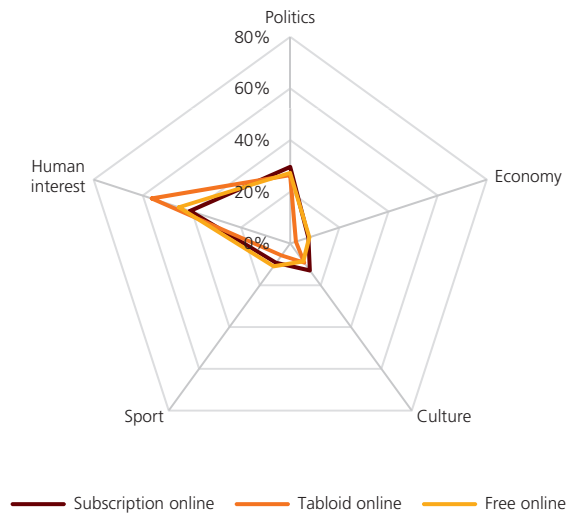


Diagram 13: News section – focus on different spheres of society
The diagram shows the percentages of stories focusing on the different spheres of society addressed by the news section of each online type. It is based on all stories in the news section on the sample dates of 16 and 17 September 2010 (n = 269).

Interpretation example: A comparison of the online types shows that the news section of online tabloid papers concentrates most on human interest stories (56%).

Quality validation

- **Tabloidisation of reporting:** Tabloidisation can be seen in the growth of soft news sections at the expense of hard news sections, in the filling of the political and news sections with soft news (see diagrams 12 and 13) and in a proportion of personal and private stories which is high compared with the other media forms (see diagram 14) and even pervades political reporting. The pressure to be newsworthy also leads to an extremely episodic style of journalism, while the ingrained click rate mentality is conducive to a moralising/emotive reporting style, especially in stories which include the journalist's own input. In many of the online resources in the study, journalistic input equates to making incoming stories more emotive and exaggerated in order to make them more attention-grabbing.
- **Convergence of online types:** While in the online form, as in the press form, the subscription sites (i.e., the news sites of the subscription newspapers) are characterised by higher quality reporting, the online

subscription type is becoming more similar to the other two online types (tabloid and free online). That is to say that while, in terms of the scope of reporting and the focus on hard news reporting in the political and economic sections, the subscription type of online service fares best, the news sites of the regional subscription press suffer particularly badly from the increase in sport and human interest reporting at the expense of political reporting – this can be observed on the front pages of all online media types.

- **Low proportion of contextual reporting:** Because of the pressure to be newsworthy and in view of the tendency simply to reuse (agency) reports, online reporting is very episodic and so includes very little background information. Here, too, the online services of the subscription newspapers perform particularly badly compared with their printed editions, even though *NZZ Online*, with 25% thematic reporting in the sections included in the study, came first among online media (but this rep-

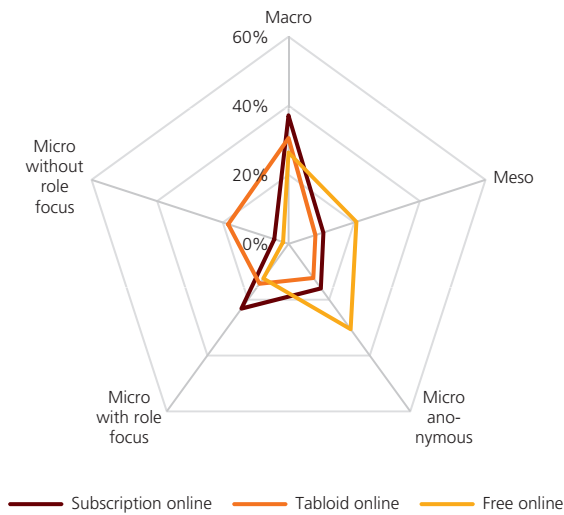


Diagram 14: Political section – focus on social levels

The diagram shows the percentages of stories focusing on the different social levels (with the exception of the “not applicable” category) addressed by the political section of each online type. It is based on all stories in the political section on the sample dates of 16 and 17 September 2010 (n = 377).

Interpretation example: A comparison of the online types shows that the political section of online tabloid papers has the highest proportion (18%) of reporting on politician’s private lives (micro without role focus).

resents only half the contextual reporting that appears in the printed edition). There are also considerable differences between the online outlets when it comes to the front pages: while *NZZ Online* and *tagesanzeiger.ch*, each with 13% thematic reporting, still attempt to put stories into context, the reporting on *20minutes.ch* and *24heures.ch* is almost exclusively episodic in nature (98% and 97%, respectively). It is noticeable here that *20minuten.ch*, with a proportion of 11% thematic reporting, can come close to *NZZ Online* and *tagesanzeiger.ch*.

- *Compared with last year*, both the tabloidisation and the trend towards convergence have become more marked in online media. While the level of diversity and topicality has remained similarly low, the social relevance of the reporting has declined as a result of the increased focus on personal stories. Only the professionalism is increasing, if measured in terms of the proportion of cognitive-normative reporting and journalistic input. Nevertheless, this latter indicator should be interpreted with care, in view of the

fact that, in the online media, journalistic input often only extends as far as adding an emotional edge to stories in order to boost the click rate.

- *Agencies and topicality:* In order to meet the need to be newsworthy, online news sites use far more agency reports than daily newspapers. There are differences in the practices relating to reusing articles from daily papers. *Tagesanzeiger.ch*, like the free and tabloid online outlets, depends more heavily on the printed edition but gives the stories highly emotive headlines, as it does the agency reports (42% of the reporting), which are edited more frequently than is the norm. “Editorial input” here, then, means exaggeration in the adding of the headline. The worst offender in this type of cross-media manipulation of stories is *Blick*: it is on *Blick.ch* that the highest proportion of “editorial input” as described above is to be found.
- *Online news sites continue to lag behind expectations:* Overall, analysis of the news sites spawned from the traditional publishing houses presents a sorry picture. From a commercial perspective, it can be seen that over the years the online media have drawn media consumers away from the paid-for press, but without having sufficient revenue to finance suitably talented and professional editorial offices. Furthermore, despite the continuing growth of the Internet, the daily amount of time spent accessing sites is also decreasing. In terms of content, the strong pressure to be newsworthy, the lack of resources and the shifting patterns of use which result in the online free services damaging their own subscription publications – notwithstanding the differences between specific media outlets – all mean that the online news sites are of the worst quality of all the four media forms which were investigated. Reporting in the online media is less diverse and socially relevant, and also strongly event-driven, at the expense of any reporting of background information, and with a strongly moralising/emotive charge in order to boost the click rate. This will not be without its consequences for information journalism in Switzerland, because the next generation of users is largely being influenced as media consumers by the free media, both offline and online.

6. In-depth studies

6.1 Northwest and Southeast Switzerland: the concentration process and media structures in the regional press market

The issue and the methodology

This in-depth study on the media structures in the press market in Northwest and Southeast Switzerland is the first in a series which will carry out detailed analysis of regional media arenas. For the purposes of these regional in-depth studies, the selection criterion for the media outlets included in the Yearbook, namely that they can potentially reach 0.5% of the population over the age of 15, which is normally applied to the three main linguistic regions, is applied to regional administrative areas. This allows small newspapers to be taken into account which are nevertheless of regional or local importance. In this way the media structures can be shown at the level of cantons and municipalities, so as to take account of the federal structure of Swiss democracy and the quality of public communication also at this level.

Consequently, these regional in-depth studies focus on the media structures in relation to the political units of the canton and the municipality. Of particular interest was the process of concentration in press markets and how this is affecting the media structures in these regions. The first in-depth study of this type is on the range of press products in the regions of Northwest and Southeast Switzerland. First of all, it introduces the main press products in these regions, in the context of the media structure in German-speaking Switzerland as a whole. The study then looks at the effect that the strong position of *AZ Medien AG* in Northwest Switzerland and of *Südostschweiz Mediengruppe AG* in Southeast Switzerland has on the media structures there. Here it is interested in the implications of the market-dominant positions of media corporations in the regions both on external plurality, in the form of diversity of outlets, and on internal plurality, within the specific media outlets. This study was carried out as part of a research project financed by the Federal Office of Communications (BAKOM) on “Media concentration and diversity of opinion” (2010).

- *Diversity of publications in German-speaking Switzerland:* If we look at German-speaking Switzerland as a whole, then both *AZ Medien AG* and *Südostschweiz Mediengruppe AG* contribute to external plurality and publication diversity with their subscription and Sunday press publications. This is due to the fact that both media companies have been able to retain their independence, i.e., they were not taken over as part of the regional expansion strategy of the *NZZ Group* and *Tamedia AG*.
- *Regional concentration:* The strong position of *AZ Medien AG* in Northwest Switzerland (see diagram 15) and the virtual monopoly of *Südostschweiz Mediengruppe AG* (see diagram 16) form the basis for their economic success and their independence. It is this that enables the two companies to continue to publish newspapers which are able to maintain their position because of the journalistic service they provide compared with rival products in German-speaking Switzerland. Furthermore, their main daily papers (*Aargauer Zeitung* and *Südostschweiz*) and the two Sunday papers (*Sonntag AZ* and *Südostschweiz am Sonntag*), and their Internet platforms, form the basis for further development of the companies, in the light of the convergence of information media on the Internet. This shows that the market-dominant position of one media company in its own regional context makes it able to resist inter-regional or national concentration processes. However, this gives these media companies the very special responsibility of contributing to democracy in their regions by providing high-quality media. It means they have to perform not only the forum function of public communication but also the legitimization, control and social integration functions.
- *Regional concentration reduces journalistic diversity:* However, the price to be paid for the strong position of *AZ Medien AG* and *Südostschweiz Mediengruppe AG* in their regional press markets is that journalistic diversity within those regions is reduced. The multiple use of articles in the regional sections both of the regional editions of the main papers, and of other papers with their own masthead, reduces both external and internal plurality, i.e., the journalistic diversity in the regional media arena, and the forum function within the papers themselves, are both reduced. It is noticeable that the reuse of articles is

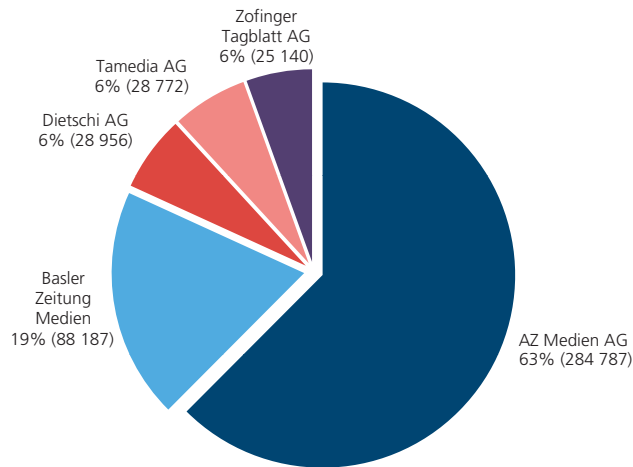


Diagram 15: The concentration process in the subscription and Sunday press market in Northwest Switzerland

The chart shows the five controlling companies in the subscription and Sunday press markets in Northwest Switzerland. It is based on the cumulative circulation figures for the 12 subscription and Sunday press titles in this region (n = 455,842).

Interpretation example: AZ Medien AG is the company with the strongest market position in the subscription and Sunday press market in Northwest Switzerland (63%). In 2010, the subscription and Sunday press titles controlled by AZ Medien AG had a total circulation of 284,787.

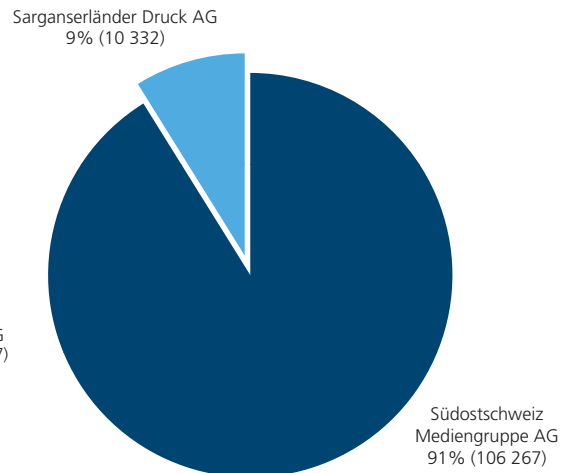


Diagram 16: The concentration process in the subscription and Sunday press market in Southeast Switzerland

The chart shows the two controlling companies in the subscription and Sunday press markets in Southeast Switzerland. It is based on the cumulative circulation figures for the five subscription and Sunday press titles in this region (n = 116,599).

Interpretation example: Súdostschweiz Mediengruppe AG is the company with the strongest market position in the subscription and Sunday press market in Southeast Switzerland (91%). In 2010, the subscription and Sunday press titles controlled by Súdostschweiz Mediengruppe AG had a total circulation of 106,267.

far more frequent in the regional reporting of outlets belonging to AZ Medien AG than in those of Súdostschweiz Mediengruppe AG.

- *Regional-local weekly press under the control of the regional and major publishers:* The regional-local weekly press – below the level of daily main papers with regional editions, daily papers with their own masthead, and the Sunday papers – plays a similar journalistic role in both regions, despite differences in their ownership status. In the home territory of AZ Medien AG in Northwest Switzerland, the 39 regional-local weekly papers, with a total joint circulation of at least 1,224,660 copies, are still largely controlled by regional publishing companies with their roots in the printing industry. The outlets controlled by AZ Medien AG itself have a circulation

of 223,538 copies. By contrast, Súdostschweiz Mediengruppe AG controls about 50% of the circulation, or 15 out of all 21 regional-local weekly papers in Southeast Switzerland, which together have a total circulation of 276,494 copies. The journalistic role of this weekly press, because of its proximity to local institutions, clubs and companies, is mainly to perform the social integration function of public communication. On account of its embedded position, it neglects the forum, legitimation and control functions, which is reflected, among other things, in less critical reporting on established people in authority. When combined with commercial interests, it is also the reason why the journalistic rule about keeping editorial and advertising content separate is often flouted.

6.2 Treating foreigners as a problem in direct democracy

The issue

This in-depth study asks what the explanation is for the strategy which has been very widespread in Switzerland for some time, and successful at voting time, of making foreigners and asylum seekers, an important theme in public communication, and treating them as a problem. It looks among other things at the extent to which political figures use the resource of advertising to maximise their chances of making an impact in the media on the question of treating foreigners as a problem. The study also investigated the question of the effect that the quality of journalism has on the intensity and nature of how foreigners are treated as a problem. To answer this, they looked at the quality of reporting (thematic versus episodic reporting; diversity of individuals and opinions), and compared it with the impact of the initiatives, and the different media formats in which they were presented by journalists.

- *Factors in the ever-virulent issue of treating foreigners as a problem:* In the news media in (German-speaking) Switzerland, foreigners and ethnic minorities are repeatedly presented as being a problem. The following factors play a role in this: firstly, direct democracy offers politicians the opportunity to present foreigners as a problem, and to put this issue on the agenda. Secondly, the quite strong cultural self-image of the Swiss, which is not based on ethnicity, and which makes openly racist xenophobia difficult, also means that a “softer” form of treating foreigners as a problem is less discredited. Thirdly, especially since the 1990s, the rise of right-wing populism has further eroded the already weakening taboo on xenophobia, because in Switzerland this attitude is represented by an established party in the Federal Council, and one which, furthermore, spends far more on political advertising than other Swiss parties or comparable political organisations in other countries. Fourthly, recent structural changes in the public sphere (especially the commercialisation of the media) have meant that (provocative) political campaigns are able to define the editorial content of the news media. Media populism offers political populism a good opportunity to make an impact,

because the latter serves the purposes of the news media agenda, not least with its use of emotive and controversial messages and scandal-mongering. Fifthly, the treatment of foreigners as a problem is becoming increasingly accepted among wider bands of the population, partly because of the structural change in immigration away from “underclass migration” towards “intermixing migration”; and sixthly, the common phenomenon is being observed that, in periods of uncertainty about the country’s direction, foreigners can successfully be made and presented as a problem.

- *Well-financed, provocative referendum campaigns and strong resonance in the media:* The interplay of these factors can be demonstrated by the example of the debates about the minaret and the expulsion initiatives: the Swiss People’s Party (SVP) was able, with considerable success and by spending a great deal of money, to make use of the medium of the people’s initiative (also) in the context of the federal elections. Amid the uncertainty induced by globalisation and the global economic crisis, it was able not only to put “its” manifesto on the top of the political and media agendas, but also to gain widespread acceptance for its interpretation of the problem. This can be seen from a number of indicators. The two initiatives of the SVP (and, in the case of the minaret initiative, also of the Federal Democratic Union party, EDU) received a great deal more media attention than other initiatives. A comparison with the “left-wing” initiatives on the “banning the export of weapons” and on “fair taxation” shows that, there, considerable resources were spent on the “no” campaigns, whereas in the case of the “right-wing” minaret and expulsion initiatives, there were really only the “yes” campaigns of those who initiated the process. However, the highly asymmetrical campaign resources of the political actors do not entirely explain the different levels of coverage in the media of proposals from the SVP compared with those of other political players. A key factor in the media coverage was the provocative nature of the campaigns on the minaret and expulsion initiatives. The politically incorrect is highly newsworthy. This is the only reason why these paid-for media campaigns are able to play a part in determining the agenda of the media (“free media”).

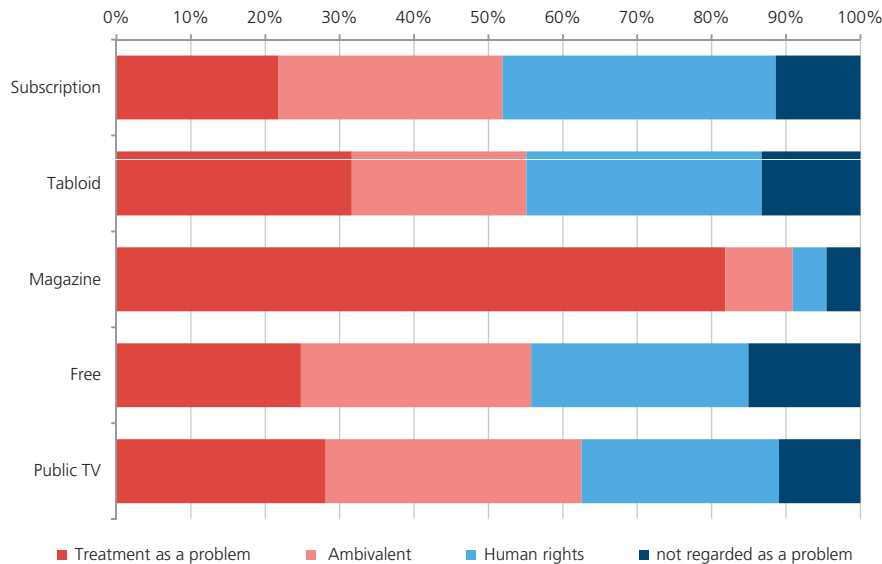


Diagram 17: Coverage given to the interpretation that foreigners are a problem, in the reporting on the minaret and expulsion initiatives

The diagram shows, for each media type, the breakdown of the coverage given to the different interpretations in reporting on the minaret initiative and the expulsion initiative in the period from the start of October to the day before the vote in November (in 2009 and 2010, respectively). The data is based on a maximum of three central statements which were recorded for each article (with the exception of interpretations which did not relate to the contents of the voting proposals, such as conflict or strategy frames) (n = 741 statements).

Interpretation example: In the reporting on the minaret and expulsion initiatives, statements presenting foreigners as a social problem accounted for 22% of the coverage in the subscription papers, but 82% in the magazine.

- *Quality deficiencies in reporting, especially in the free papers and in the Weltwoche:* The worst-quality reporting is to be found primarily in the free newspapers and the magazine *Weltwoche*. The “horse race” style of journalism in the free papers and to some extent also in the tabloids made sure that conflict between the SVP and those minorities affected by the initiatives was built up and dramatised, while established parties, and any expert opinions which were expressed in opposition to the proposals, were rarely covered. In this way, the debate in the media shifted the actual line of conflict from being between politicians who were in favour and those who were against, so that it became one between the supporters of the initiatives and the group of foreigners who were being presented as a problem. The free papers had an episodic style of journalism which stylised the conflict, neglected any discussion of the facts and weakened any rational debate leading up to the referendum. The ideological style of opinion journalism in the *Weltwoche* only gave a voice to a limited spectrum of individuals and opinions and

itself became part of the campaign. Public television, in its news reporting, confined itself mainly to “chronicle-style” journalism, reporting the various campaign activities and statements of both camps. Only the subscription newspapers (and to some extent also the tabloids) (still) pursued a thematic style of forum journalism, which also gave broad coverage to the agenda put forward by the SVP but put it into more context.

- *Treating foreigners as a problem was the dominant issue in public communication:* Finally, it emerged that in all the reporting on the minaret and expulsion initiatives, across all the media types which were investigated, fundamental opposition to the treatment of foreigners as a problem, and therefore to the reasons behind the initiatives, was only expressed in 12% of the statements, and therefore only on a marginal scale. 32% of the statements positioned themselves against the proposals, pointing to the issue of human rights and making accusations of xenophobia, but these arguments did not dispute the fundamental interpretation of the situation – “Muslims in

Switzerland” or “criminal foreigners” as the underlying problem. This means that the supporters of the initiative and the “no” camp with their arguments talked past each other. Statements emphasising the problem (28%), and ambivalent statements which did not dispute the problem itself but only the way of solving the problem (28%), together accounted for the majority of the reporting (56%), not only, though particularly noticeably, in the *Weltwoche* (91%), but also on public television (63%), in the free papers (56%), the tabloids (55%) and the subscription papers (52%) (see diagram 17). Treating foreigners as a problem was widely accepted by a broad spectrum of actors, and the successful and provocative campaigns by the SVP were reflected in the media. The SVP’s interpretation of the problem clearly asserted itself in mainstream public communication.

6.3 Monopoly of the Swiss news agency (sda), and practices in using agency reports in the press

The issue

The crisis in the media, the vanishing resources for journalism and the pressure to be newsworthy are all increasing the dependency of editorial offices on externally produced media content such as that provided by news agencies. This influence of agencies affects the quality of the media firstly in terms of professionalism, if the principle of source transparency is breached, i.e., agency material is not identified as such, or is even presented as in-house editorial input. Secondly, the influence of agencies also affects the diversity aspect. If the influence of agencies is too great and too one-sided, it can result in the content and interpretations in the media arena all being very similar, especially if, as in Switzerland, one news agency, *sda*, has a virtual monopoly on domestic reporting.

It is in this context that this in-depth study deals with the implications of the *sda* monopoly and the practice of using agency material in the Swiss press arena. The main area of interest is whether the start of the virtual *sda* monopoly in the spring of 2010 has led to an increase in the influence which *sda* exerts on press reporting and whether quality standards are maintained or damaged when agency material is reused. In

order to be able to answer this question properly, some plagiarism-detecting software was specially developed for this project, which is able to identify agency material regardless of how the article is labelled.

- *Increase in the influence of sda*: A comparison of press reporting in 22 outlets during the period of the study from 2009 to 2010 confirms that the influence of *sda* in the press arena has increased significantly since its monopoly came into effect in the spring of 2010. Whereas in 2009 *sda*’s share of the total number of articles identified as agency reports was 32%, in 2010 this figure increased to 47%. If you add to this figure the reports from *Si-Sportinformation* – a sports news agency that is 100% owned by *sda* – then the proportion of *sda/Si* reports in the total of all recorded agency reports in 2010 reaches a huge 70%. The influence of *sda* increased more in German-speaking Switzerland after the start of the monopoly than in French-speaking Switzerland. In French-speaking Switzerland, the influence of *AFP* remains substantial and is slowing the advance of *sda* (in Italian-speaking Switzerland it was not possible to measure the trend effectively due to a shortage of statistics).
- *Supremacy of sda in domestic reporting*: The increase in the supremacy of *sda* is particularly marked in the domestic politics (99%), regional politics (84%), culture (69%) and human interest (64%) sections. Even in the foreign news sections, the influence of *sda* is growing. The dominance of *sda* is particularly problematic from the point of view of media quality when it comes to domestic reporting. Firstly, it affects journalistic diversity in the press arena. Secondly, there is a growing requirement for the press outlets to make the fact that *sda* is their dominant source transparent. And thirdly, higher quality standards are also expected of *sda*, if it is having such a strong influence on reporting in the press arena.
- *Seven typical practices when using agency reports*: In addition to the quantitative analysis of the effects of the *sda* monopoly, for eight outlets in the free, tabloid and subscription press types the study looked at the extent to which quality standards were being damaged by the use of agency material by the media. The agency hits that were identified by the plagiarism-detecting software were subjected to cluster

Cluster no. Type of practice		Blick	20 Minuten	Die Südostschweiz	Tages-Anzeiger	Neue Luzerner Zeitung	Berner Zeitung	Neue Zürcher Zeitung	Basler Zeitung
Problematic practices	Cluster 1 (5.2%) Non-transparent copying & pasting	14%	28%	11%	3%	1%	–	–	–
	Cluster 2 (7.2%) Non-transparent distortion	–	36%	7%	4%	15%	1%	4%	4%
	Cluster 3 (8%) Tabloidisation, unreliable identification	7%	25%	1%	15%	5%	5%	6%	6%
	Cluster 4 (11%) Unreliable identification of soft news	72%	4%	5%	10%	9%	21%	3%	7%
	Cluster 5 (7.2%) Unreliable later use	7%	6%	7%	6%	3%	5%	14%	9%
Unproblematic practices	Cluster 6 (45.3%) Transparent reuse of soft news	–	–	29%	15%	18%	13%	11%	19%
	Cluster 7 (16.1%) Transparent reuse of hard news	–	2%	39%	47%	49%	55%	62%	55%
Total of problematic practices		100%	98%	31%	38%	33%	32%	27%	26%

Diagram 18: Different media practices in using agency reports

The table shows the proportion of the various practices/clusters deployed by the different press outlets in reusing agency reports. The data includes all the reports identified by the plagiarism-detecting software in media reporting during the week covered by the study in September 2010 (n = 763). Cluster analysis was used to assign the different patterns deployed by the media to seven typical clusters. Clusters 1 to 5 are classified as being of poor quality; Clusters 6 and 7 do not present a problem from the point of view of quality. Figures over 10% have been highlighted.

Interpretation example: 100% of the reports in *Blick* that were identified as having been taken from agencies were problematic; 98% of those in *20 Minuten* were problematic. 2% of the reports taken from agencies by *20 Minuten* were unproblematic. In the *Neue Zürcher Zeitung*, 27% of cases of reuse of reports were problematic; however, 73% of the cases of reuse of agency reports by the *Neue Zürcher Zeitung* were unproblematic.

analysis and assigned to one of seven typical practices in the use of agency reports (see diagram 18). Five of the practices that were identified (clusters) are problematic from a quality point of view, two are not. The proportion of unsatisfactory practices in the use of agency material by the press arena that was investigated was a very high 40%.

- *Problematic practices in using agency reports:* The practice of “non-transparent copying & pasting” (*Cluster 1*) was detected in 5.2% of all cases. This is characterised by the complete lack of source transparency, the extensive takeover of text and the use of visualisation techniques by means of which the original agency report is given the appearance of in-house editorial input, for minimum effort. This

problematic practice is to be found by far the most frequently in *20 Minuten* (28%), followed by *Blick* (14%) and *Südostschweiz* (11%). The practice of “Non-transparent distortion” (*Cluster 2*) is also characterised by the completely non-transparent handling of sources. However, unlike in *Cluster 1*, here the text of the original agency input is extensively rewritten. This problematic practice was again seen most frequently at *20 Minuten* (36%) and in the *Neue Luzerner Zeitung* (15%). It affected 7.2% of all agency reports that were detected. In the practice of “tabloidisation” (*Cluster 3*), *sda* agency reports in the soft news category are reprinted in the hard news category and only identified as such unreliably, i.e., sporadically. The specialist in this problematic prac-

tice, which was detected in 8% of cases, is once again *20 Minuten* (25%). However, the *Tages-Anzeiger* was also prominently represented in this cluster (15%). In the practice of “unreliable identification of soft news” (Cluster 4), the main problem lays in taking over soft news reports with, in some cases, the standards of source transparency being breached. Agency reports were wrongly carried under the name of the editorial office, or not identified at all. This problematic practice is the speciality of the tabloid paper *Blick* (72%), but the *Berner Zeitung* also shows a high proportion of these cases (21%). It was identified in 11% of all agency reports that were used. The characteristic feature of the practice of “unreliable later use” (Cluster 5) is the time-delayed printing of agency reports which are not reliably identified as such, i.e., on average in 60% of cases. The *Neue Zürcher Zeitung*, which is otherwise exemplary in its use of agency reports, had the highest proportion of reports in this cluster (14%). Altogether, this pattern was identified in 7.2% of the cases of reuse.

- *Unproblematic practices in using agency reports:* The two practices of “transparent reuse of soft news and hard news” (Clusters 6 and 7) can be regarded as unproblematic from the point of view of journalistic quality (a total of 60% of all cases). Correctly identified agency reports from the soft news category are published by soft news desks and agency reports from the hard news category are published by hard news desks. This form of agency reuse is typical of the subscription newspapers. The most frequent occurrence of the unproblematic pattern of transparent reuse of hard news is in the *Neue Zürcher Zeitung* (62%). However, it should be noted as a proviso that even these practices can lead to a loss of quality, namely if the editorial office’s own input is sidelined by this kind of use of agency reports.
- *Tabloid and free newspapers have the worst quality deficiencies:* On the whole, the practices of the free newspaper *20 Minuten* in reusing agency reports must be classified as extremely poor quality. Problematic practices are dominant, at 98%. Agency reports are used in their entirety without identifying them as such (Cluster 1: 28%), or else they are partly rewritten so as to make them look like editorial input (Cluster 2: 36%). There is also a common practice of “pepping up” agency reports with very

little effort; visualisation techniques are used for this: agency reports with no byline are enhanced with pictures and diagrams and presented as if they are detailed reports. The practices of the tabloid paper *Blick* are also of very poor quality. Problematic practices prevail here, as much as 100%. Agency material is never identified as such; there is also a widespread practice at *Blick* of using agency reports (with no byline) simply by “copy & paste”.

- *Differences in the subscription papers:* Unlike in the free and tabloid newspapers, where the problematic practices clearly dominate, in the subscription papers the unproblematic practices prevail. However, there are also clear differences between the subscription papers: At the *Tages-Anzeiger*, 38% of all cases where agency reports were used could be classified as problematic. In a comparison of all the subscription newspapers, that was the worst figure. Of the problematic clusters, practice 3 predominates (15%), where only partially identified agency reports from the soft news department are reprinted by the hard news desk. At the *Neue Luzerner Zeitung* (33% problematic practices), the negative results were mainly in Cluster 2 (15%). This reuse practice is characterised by the complete lack of transparency and the fact that the original agency reports are distorted, rewritten or enhanced in such a way that they are supposed to look like in-house input. Of the 32% of problematic practices at the *Berner Zeitung*, practice number 4 accounts for the majority. Most often, agency reports are taken from the soft news department without them being consistently labelled as such. At the *Südostschweiz*, the proportion of problematic practices is 31%. Of all the subscription newspapers, the *Südostschweiz* has the most cases of problematic practice number 1 (11%), characterised by the complete takeover of agency reports by “copy & paste” without identifying them. The fewest problematic practices were to be found at the *Neue Zürcher Zeitung* and the *Basler Zeitung* (27% and 26% problematic practices, respectively). When problematic practices do occur at these titles, they are in category 5: agency reports are reprinted later without them being reliably identified.

6.4 Influence of Public Relations in corporate reporting

The issue

Journalism must be independent – it should serve the general interest and not particular interests and maintain a critical distance from the subject on which it is reporting. In contrast to journalism's duty to serve the public good, Public Relations invariably serves particular interests. However, since the 1990s there has been a gradual shift in the balance of power and resources between Public Relations (PR) and journalism. The PR sector is seeing huge growth and is becoming increasingly professional. By contrast, the media industry is embroiled in a structural crisis – albeit of its own making – and, especially in the press sector, there is a growing tendency towards a lack of professionalism: for example, the system of editorial sections, which ensures a certain structure in journalistic expertise, is being replaced by multi-channel-oriented “newsrooms”. In view of the opposing dynamics in their development – PR boom versus media crisis – it can only be expected that there will be a growing PR influence in communication via the media. This PR influence was examined by looking at the press reporting on 44 major Swiss companies in the third quarter of 2010.

The study looks at both the so-called quantitative-formal and qualitative PR influences. The investigation into the quantitative-formal PR effects records the number of articles in the media which are based on PR information, and the extent to which the media articles make the PR influence transparent. When it comes to qualitative PR influences, it is a question of how much the company's perspective is taken over or transformed by the media. This shows the extent to which the media under investigation maintained a professional distance from their subject – the company – and fulfilled their control function. The study also looks at the quantitative and qualitative importance of news agencies in distributing corporate PR material.

- *Premise of the analysis: there is a significant quantitative PR influence:* The study shows that the quantitative PR influence in the Swiss press arena is very strong. No less than 40% of the corporate reporting is triggered by PR activities. In a comparison of the different press types, the highest proportion of PR-

based reporting occurs in the business press, followed by the tabloids, subscription and Sunday papers. A comparison of the quantitative PR influence in different economic sectors reveals that this figure exceeds 50% in 6 out of the 13 branches of industry that were investigated. In some branches, there is even a majority of PR-initiated reporting (mechanical engineering and construction). While corporate PR does fulfil an important information function, the dominance or even virtual monopoly of PR-initiated reporting in many industries should be regarded as problematic in relation to the forum function of the press: the great extent to which corporate reporting in the media depends on company PR jeopardises the “watchdog” function of the media, namely to highlight developing crisis situations at an early stage, such as the formation of “bubbles”.

- *Insufficient transparency in PR information:* Only 25% of articles make the fact that PR information has been used transparent to the public, i.e., visible in a prominent position. The fact that the journalistic professional standard of source transparency is so often flouted in this way prevents PR information that is interest-led from being recognised. PR that is not identified as such wrongly turns specific interests into general ones. While the subscription press still maintains the highest level of transparency, it is especially the Sunday and tabloid papers which fail to identify corporate PR as the source of their reports properly, if at all (see diagram 19). The free newspapers owe their PR transparency primarily to the agencies on which they rely for their corporate reporting. This is, then, imported PR transparency, which is the result of PR information having been identified by the news agencies.
- *Significant qualitative PR influence:* No less than 56% of corporate reporting is characterised by the fact that it accepts the views of the company's PR entirely uncritically. This means that business journalism is insufficiently distanced from its subject-matter and is not properly fulfilling its control function (see diagram 20). This finding is particularly apparent in the free and tabloid press. In these press types, corporate reporting is essentially reduced to performing the role of an advertising channel for corporate communication.

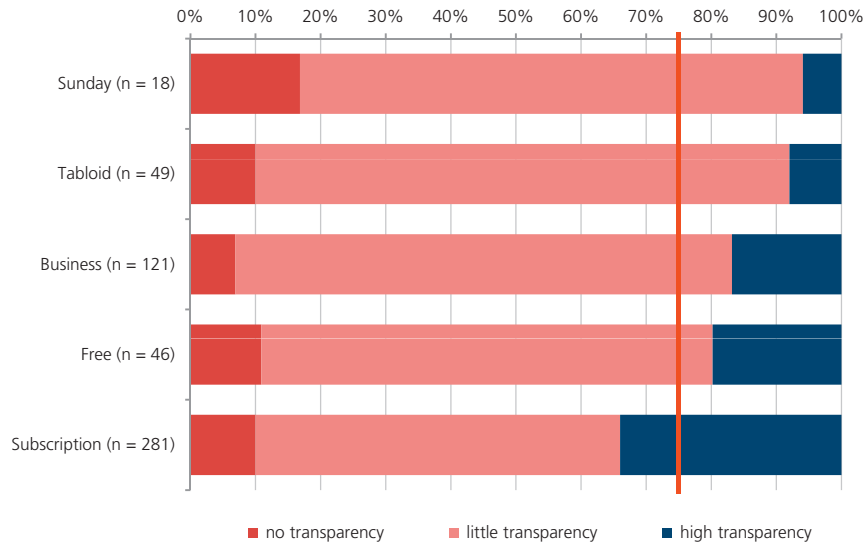


Diagram 19: Source transparency in the reuse of PR information, analysed by press type

The diagram shows the transparency of PR information, analysed by press type. The vertical (red) line shows the average proportion of reporting in the press arena as a whole, in which PR information is either not identified as such at all, or not in a prominent position (75%). The red bars show the proportion of reporting in which PR information is not identified as such. The lighter red bars show the proportion of reporting in which PR was identified as the trigger for the report, but not in a prominent position. The blue bars show the proportion of reporting which is highly transparent about PR being the trigger for the report (reuse of PR is referred to in the headline, lead sentence or first paragraph). The diagram is based on all the media articles initiated as a result of media releases from the 44 companies in the study, in the period from 1 July to 30 September 2010 (n = 515).

Interpretation example: Comparing the press types shows that the subscription newspapers contain the highest proportion of reports with a high degree of transparency (34%).

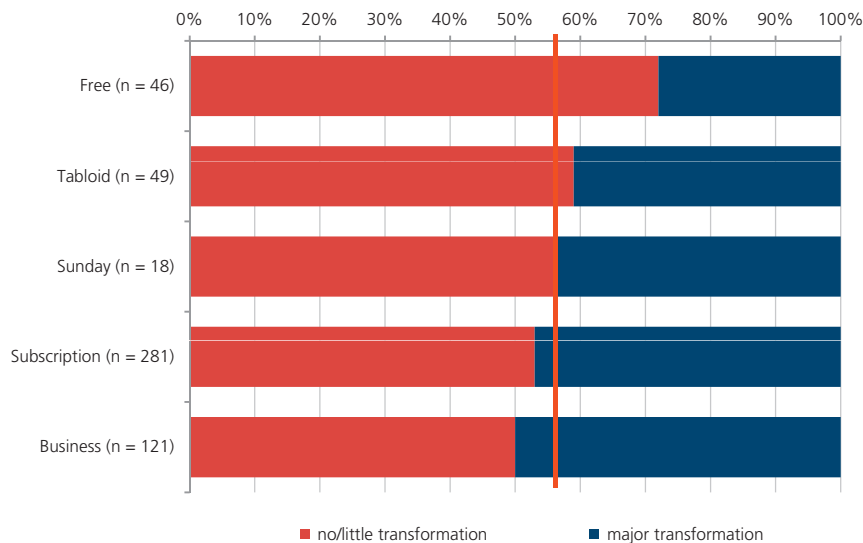


Diagram 20: Qualitative PR influence, analysed by press type

The diagram shows the extent to which the content of PR information is transformed in reporting, analysed by the different press types. The vertical (red) line shows the average transformation of the content in the press arena (44%). The red bars show the proportion of the reporting in which PR information is used largely uncritically. The blue bars show the proportion of the reporting in which there has been some transformation of the content of the PR information. The diagram is based on all the media articles initiated as a result of media releases from the 44 companies in the study, in the period from 1 July to 30 September 2010 (n = 515).

Interpretation example: A comparison of the press types shows that the least transformation of PR information takes place in the free media, with a proportion of 28%.

- *How timing is controlled by PR, and the consequences of this:* From the point of view of timing, corporate reporting is largely controlled by the companies' own event management. 62% of all the articles based on a press release appear the day after the publication of the press release. The evidence indicates that the faster the PR information is used by the media, the less filtering of the company perspective there is when it appears in the media. With this focus on topicality, there is inevitably a shortfall in the legitimization and control function of the media which would result from engagement by the journalists with the subject on which they are reporting.
- *Significance of news agencies:* News agencies play a central role in distributing PR information in two respects. Firstly, with regard to the quantitative PR influence, they act as multipliers for PR information. If a media release is published in agency reports, it has a more than six times higher chance of passing the media's selection criteria and attracting attention in the media. Secondly, agency reports based on PR information also increase the probability that the original company perspective will be carried through into the media reporting, unfiltered. The use of PR input in agency reports therefore leads to an increase in both the quantitative and qualitative influence of PR in reporting.

6.5 The double weak point: frequency of errors and correction management

The issue

Journalism, especially in the Internet era, is extremely fast-moving and therefore error-prone. Confidence in journalism, and its credibility are both steadily declining. Now this study looks for the first time at how error-prone the media's reporting in Switzerland and Italy really is, and compares the results with a previous study in the USA. The study looked at errors which were noticed by the relevant sources of the information. From each of the newspapers under investigation, a random sample of 200 articles was selected and the individuals who were named in the articles as the main sources were traced and questioned.

- *Large number of factual errors noticed:* The people questioned found more reporting errors in Switzerland than in Italy or the USA. They complained of factual errors, such as incorrectly written names, incorrect addresses or inaccurate details about where an event happened, in 60% of the Swiss articles that were looked at, while in Italy the figure was 52% and in the USA 48% of cases. Regarding the seriousness of the errors that were found, the people who were questioned in Switzerland found the errors less serious than the people in Italy or the USA. The willingness of the sources to make themselves available again as a source of information was also far greater in Switzerland than in Italy or the USA. However, the results of the research in Italy can only be explorative because of the low response rate.

Newspaper title	Credibility of the news report	Credibility of the paper	Willingness of sources to cooperate
No. of factual errors	-0.449 -0.230	-0.236 -0.167	-0.201 -0.105
Average seriousness of the factual errors	-0.462 -0.393	-0.305 -0.349	-0.242 -0.148

Pearsons r, p <0.001;
country-specific comparison: normal font = USA, **bold** = Switzerland

Diagram 21: Connection between frequency of errors and the credibility of the newspaper

The diagram shows that not just the credibility of the articles in question, but the credibility of the whole newspaper suffers as the number of recorded errors rises. Furthermore, the willingness of the information sources to make themselves available again also declines. However, these correlations are less marked in Switzerland than in the USA. To determine the credibility of a newspaper, a six-factor index was created. This was based on the perception of the newspapers by the sources, with regard to fairness, accuracy, impartiality, trustworthiness and fact-based reporting. The index for the credibility of the news report, on the other hand, was based on accuracy, fairness, context, comprehensibility, newsworthiness, tenor, the reason for the article (for information or to boost circulation) and appropriate presentation of the event.

Interpretation example: In Switzerland, the seriousness of the errors in the perception of the information sources has a particularly marked effect on the credibility of both the news report and the newspaper as a whole.

- *Regional differences in Switzerland:* In a comparison of the Swiss publications that were analysed in the study, the *Aargauer Zeitung*, *Basler Zeitung*, *Berner Zeitung*, *Südostschweiz* and the Zurich-based *Tages-Anzeiger*, there are some slight regional quality differences regarding the number and seriousness of the errors that were noticed. While the people questioned about the *Südostschweiz* reported factual errors in nearly 57% of all articles, at the *Tages-Anzeiger* it was on average nearly 63%. If you also include subjective errors – i.e., if the article is judged by the information source to be exaggerated or sensationalist, for example –, then the picture is similar: the proportion of this kind of error noticed in the *Tages-Anzeiger* was 10 percentage points higher than in the *Südostschweiz*.
- *Errors damage credibility:* The number and seriousness of errors have a negative effect on the credibility of a newspaper (see diagram 21). Specifically, there was a negative correlation between the average seriousness of the factual errors that were noticed by the people who were questioned and the credibility rating for the newspaper. This relationship between the seriousness of perceived errors and the credibility of a newspaper was most clearly defined in Switzerland.



The mark of the printing and publishing house Schwabe, founded in 1488, dates back to the very beginnings of the art of printing and derives from the circle of artists around Hans Holbein. It is the printer's mark of the Petris, and illustrates Jeremiah 23:29: "Is not my word like as a fire? saith the LORD; and like a hammer that breaketh the rock in pieces?"

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Schweiz – Suisse – Svizzera**

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Das Jahrbuch zur Qualität der Medien in der Schweiz

Als im August 2010 das erste Jahrbuch *Qualität der Medien – Schweiz Suisse Svizzera* erschien, präsentierte es der Öffentlichkeit Ergebnisse einer breit angelegten Analyse. Es zeigte, dass sich die schweizerische Medienlandschaft inmitten einer entscheidenden Umwälzung befindet. Der Abfluss von Werbeeinnahmen zu branchenfremden Akteuren im Internet und die wachsende Bedeutung der Gratiskultur on- und offline bedrängen die grosse Tradition der schweizerischen Publizistik. Das erste Jahrbuch ist in der Schweiz und im Ausland auf grosses Interesse gestossen. Allein in der Schweiz wurden seine Befunde in über 100 Medienbeiträgen rezipiert. Damit wurde ein wesentliches Ziel erreicht, nämlich die Debatte über die Qualität der Medien zu intensivieren.

Hier knüpft das zweite Jahrbuch an. Es zeigt auf, wie sich die publizistische Qualität der Mediengattungen Presse, Radio, Fernsehen und Online seit der ersten Ausgabe entwickelt hat. Einen wichtigen Schwerpunkt der neuen Ausgabe 2011 bilden die verschiedenen Vertiefungsanalysen: Von Interesse ist besonders der «Copy-Paste»-Journalismus, der Einfluss von PR auf die Wirtschaftsberichterstattung und die Bedeutung von Agenturmeldungen im Vergleich zu den Eigenleistungen in verschiedenen Mediengattungen und -typen. Für diese Untersuchungen wurde eine eigene Plagiatsoftware entwickelt und erstmals genutzt. Eine weitere Detailstudie gilt dem langfristigen Wandel der Wirtschaftsberichterstattung. Sie macht deutlich, dass der Dienstleistungsjournalismus an Bedeutung gewonnen und dass die Distanz zum Berichterstattungsobjekt abgenommen hat. Die Vertiefungsanalyse zum langfristigen Wandel der Politikberichterstattung wiederum verfolgt die Resonanzen der politischen Parteien und ihrer Exponenten. Hierbei geht es um die Frage, inwieweit Medienpopulismus und politischer Populismus einander begünstigen. Am Beispiel der Regionen Nordwest- und Südost-

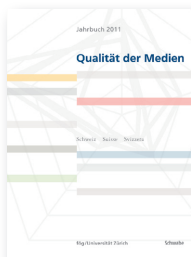
schweiz wird schliesslich untersucht, welche Konzentrations- und Qualitätsveränderungsprozesse sich im lokalen Raum manifestieren.

Das Jahrbuch *Qualität der Medien – Schweiz Suisse Svizzera* wird erarbeitet durch den fög – Forschungsbereich Öffentlichkeit und Gesellschaft/Universität Zürich (www.foeg.uzh.ch). Es wird gefördert durch die Stiftung Öffentlichkeit und Gesellschaft (www.oeffentlichkeit.ch). Sein Ziel ist es, das Qualitätsbewusstsein für die Medien in der Schweiz zu stärken. Das Jahrbuch bietet eine grundlegende Informationsquelle für Medienschaffende, Führungskräfte aus Politik und Wirtschaft, die Wissenschaft und alle Interessierten, die sich mit der Entwicklung der Medien und ihren Inhalten auseinandersetzen wollen.

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